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

Application for Certification of a Public Body
RCW 39.10 Alternative Public Works Contracting - GC/CM

Submitted by
Clover Park School District
July 3rd, 2017
July 3, 2017

Project Review Committee
C/o State of Washington Department of Enterprise Services
Engineering & Architectural Services
P.O. Box 411476
Olympia, Washington 98504-1476

Attention: Talia Baker, Administrative Support

Dear PRC Members,

Please find enclosed the Clover Park School District (CPSD) GC/CM Agency Certification application for CPSD use of the GC/CM contracting delivery method over the next three years.

In 2001, CPSD invested in improving our educational facilities for our community and our children by convening a Facility Advisory Committee to prepare a long range Facilities Plan. This committee continued to meet over the years which led to the passing of capital bonds in 2006 and 2010 totaling $157 million. These bond funds, combined with funds from the OSPI School Construction Assistance Program, allowed the district to complete construction projects at Lakeview Hope Academy, Lakes High School (GC/CM), Hudtloff Middle School and the K-12 Harrison Prep School/Four Heroes Elementary. These funds were also used to renovate a facility for an Early Learning Program in 2015 and construct an addition at Lakeview Hope in 2016.

In 2006, Clover Park School District began a partnership with Joint Base Lewis-McChord and the Department of Defense Office of Economic Adjustment to construct six new elementary schools on the base between 2012 and 2017 at Carter Lake, Hillside, Rainier, Meriwether, Beachwood and Evergreen Elementary schools totaling more than $228 million. All six projects utilized the GC/CM delivery method. Since 2006, CPSD has completed 12 major capital projects, seven of which were accomplished using the GC/CM delivery method.

In 2016, a Facility Advisory Committee was convened again and one of the recommendations of the committee was to close Woodbrook Middle School and construct a new middle school to be combined with Mann Middle School on the Mann site. In December 2016, the CPSD Board of Directors authorized the selection of an architectural firm to design a new middle school in the anticipated closure of Woodbrook Middle School between June and December 2019 when the new school is scheduled to be complete. Design programming is currently proceeding for this new middle school with schematic design scheduled to begin in July 2017 and continue through September. This project is an excellent candidate for GC/CM delivery.

Another recommendation of the FAC was to establish an on-going Facilities Advisory / Bond Planning Committee that would meet regularly and prepare a Long-Term Masterplan for potential future capital bonds. CPSD intends to establish a Bond Planning Committee later in 2017 to prepare a long term capital plan and pass a bond in late 2017 or early 2018 for projects that will benefit from the GC/CM delivery method. Agency Certification to utilize GC/CM for three years would allow CPSD to proceed with selecting a GC/CM contractor for the new middle school during schematic design. It would also allow the district to move forward quickly with any future GC/CM projects that comply with RCW 39.10 Requirements.
The CPSD has a long standing history of successfully completing GC/CM projects and the current CPSD staff have extensive experience delivering GC/CM projects. Additionally, CPSD has retained Parametrix for GC/CM procurement and advisory services and as needed for project and construction management services.

We look forward to your review of our application, the subsequent questions and feedback, and the opportunity to present our request to the PRC on July 27, 2017. Thank you in advance for your consideration of our application and request.

Mr. William Coon
Director Capital Projects/Sr. PM
Clover Park School District
(253) 583-5032
wcoon@cloverpark.k12.wa.us

cc: File
State of Washington  
Capital Projects Advisory Review Board (CPARB)  
Project Review Committee (PRC)  

APPLICATION FOR CERTIFICATION of PUBLIC BODY  
RCW 39.10 Alternative Public Works Contracting- GC/CM  

The CPARB PRC will only consider complete applications. Incomplete applications may delay action on your application. Responses to Questions 3-10 should not exceed 15 pages (font size 11 or larger).

1. Identification of Applicant  
Clover Park School District # 400  
Mr. William Coon  
Director of Capital Projects /Sr. Project Manager  
10903 Gravelly Lake Drive SW  
Lakewood, WA 98499  
(P) 253.583.5032  
(F) 253.583.5039  
(M) 206-883-0874  
wcoons@cloverpark.k12.wa.us

2. Experience and Qualifications for Determining Whether Projects Are Appropriate for GC/CM under Alternative Contracting Procedure (RCW 39.10.270 (2) (a).) Limit response to two pages or less. (See attached example of a public body’s internal project approval flow chart)

Please submit a process chart or list showing: (1) The steps your organization takes to determine that use of the procedure is appropriate for a proposed project; and (2) The steps your organization takes in approving this determination. Also submit the written guidelines or criteria that your organization uses in determining whether this alternative contracting procedure is appropriate for a project.

RESPONSE:
The flow chart below illustrates the CPSD process for determining appropriate delivery method for each project.
3. Project Delivery Knowledge and Experience *(RCW 39.10.270 (2)(b)(i).) Limit response to two pages or less.*

Please describe your organization’s knowledge and experience in delivering projects over the past 10 years, including the complexity of projects your organization built. Describe delivery methods, management structures, and project controls utilized.

**KNOWLEDGE AND EXPERIENCE**

The Clover Park School District is the fourth largest school district in Pierce County and the 28th largest public school district in the state of Washington. Clover Park School District has successfully passed over $450 million in capital improvement funding since 2006 to modernize, replace and/or build additions to 11 public schools. In 2006 CPSD passed a bond for $65 million to replace Lakeview Elementary (DBB) and for the renovation and additions of Lakes High School (GC/CM). In 2010 a bond for $92 million was passed to replace Hudtloff Middle school (DBB) and build the new Harrison Preparatory School/Four Heroes Elementary School (DBB). All projects were successfully completed on time and under budget.

The CPSD capital improvements program included 1 modernization and replacement, 8 replacements on occupied/new sites, 1 new combined (6-12) Prep School and (K-5) Elementary school and 1 addition using the DBB and GC/CM delivery method.

Lakeview Elementary ($15.6 million), Lakeview Elementary addition ($ 6.7 million), Hudtloff Middle School ($47.4 million) and Harrison Prep/Four Heroes Elementary ($75 million) were completed using the DBB delivery method. Lakes High School ($80.4 million), Hillside Elementary ($32.9 million), Carter Lake ($31.1 million), Meriwether Elementary (35.7 million), Rainier Elementary ($38.5 million), Beachwood Elementary ($39.5 million) and Evergreen Elementary ($50.3 million) were successfully completed on time and under budget using the GC/CM delivery method.

In 2006, Clover Park School District (CPSD) began a partnership with Joint Base Lewis-McChord (JBLM) to evaluate and quantify the conditions and capacity of all the elementary schools on the military installation. The outcome of that study kicked off the Public Schools on Military Installations (PSMI) program, which raised awareness of failing school infrastructures on military bases across the United States and a national program to fix educational facilities on military installations was created.

Federal budgets were established and 6 schools on JBLM were eventually constructed by CPSD between 2012 and 2017. Funding for the new schools came from the Department of Defense’s Office of Economic Adjustment (OEA) and Washington state school construction funds.

CPSD utilized GC/CM to construct all six elementary schools on JBLM which were Carter Lake, Hillside, Rainier, Meriwether, Beachwood and Evergreen. For management of the projects the district used OAC Services for project and construction management. In 2015 the district hired Bill Coon as Director of Capital Projects. Bill has the background and experience to also manage projects directly so for any future capital projects, the district intends to utilize Bill for project management and will supplement with internal staff and project management consultants as appropriate.

**See District GC/CM Experience: Project Photos and Descriptions – Exhibit B**

Through this experience, the District has developed the institutional knowledge and staff skillsets and capabilities to successfully plan and deliver projects using the GC/CM method in compliance with RCW 39.10 requirements. In addition to major capital projects, the District annually completes multiple maintenance and renovation projects valued at several million dollars. These projects maintain the district’s 1.9 million square feet of inventory and provide for ever changing
The District successfully utilizes a variety of contracting and delivery methods such as design-bid-build, GC/CM, small-works contracting, and Energy Services Company (ESCO) contracting projects based on the size, complexity and statutory limitations of each project.

The District maintains an experienced internal capital facilities staff of executive, financial, risk management and administrative experts that support the internal Project Management District staffing augmented with project management consultants and legal professionals to provide scalable, highly flexible and responsive solutions for all of our large and small capital development needs and requirements.

**MANAGEMENT STRUCTURES**

Authorization and funding for school construction and maintenance projects is through voter-approved bond and levy measures. Bond resolutions detail the planned projects, the overall budgets, and the general timelines and authorized uses of bond proceeds. Bond resolutions are prepared and voted on by the Board of Directors. The current Board President is Dr. Marty Schafer. Dr. Schafer has served on the Board since 2005. jschafer@cloverpark.k12.wa.us

Capital projects are planned and directed by the Administrator for Business Services & Capital Projects, Rick Ring. Rick oversees the long term planning for facility development, strategic planning, capacity forecasting and the resultant boundary adjustments. In addition to these duties Rick administers the financial services, maintenance & operations, student nutrition and transportation departments. Rick has been with the district for three years. Prior to that Rick was Chief Operations Officer / Assistant Superintendent of Operations for St. Vrain Valley School District in Longmont, Colorado. rring@cloverpark.k12.wa.us.

Direct management of all capital projects large and small including execution strategy, delivery method recommendations, contracting, design and construction is led by Director of Capital Projects/Sr. Project Manager Bill Coon. Bill directly oversees the selection of consultants, the design of each facility, delivery method decisions, procurement of contractors, scheduling, budget allocations, and design standards among other duties. Bill has been with the district for two years and has been involved with school planning and construction since 2000. In addition Bill has also served as a management consultant to school districts in WA State and as a regional coordinator for OSPI in Olympia administering the School Construction Assistance Program (SCAP). wcoon@cloverpark.k12.wa.us.

Augmenting Rick and Bill’s leadership is CPSD experienced financial services staff and Purchasing Manager Latanya Figueroa who has been actively involved with all capital projects for the district since 2008. Latanya provides project support and FF&E planning and procurement as well as other duties associated with project management. On smaller capital projects Latanya has directly managed the planning and construction process. lfigueroa@cloverpark.k12.wa.us

See District Planning and Construction Organizational Chart—Attachment C

In addition to CPSD executive, management, financial, project and administrative staff members, the District has contracted for project management and construction management services with consulting firms since 2006 to provide scalability and unique expertise when and where needed. CPSD, along with other large school districts, have found augmenting its own staff with consultants provides the ability to add and reduce staff and acquire specialty skills quickly, notwithstanding, maintain a constant base of full time District employees through both the lean recession and explosive inflating market shifts.
Serving the District with alternative delivery, program and project management services is Parametrix. Led by Program Manager Jim Dugan and in direct report to Administrator of Business Services and Director of Capital Projects, a wide variety of services are provided as needed to augment the CPSD internal team as the overall capital program workload ebbs and flows.

**CONTROLS**

Over the past couple of decades the District has developed a comprehensive management and controls systems to assure projects are delivered on-time, under-budget and in-line with District standards. Leadership team meetings and Weekly Directors meetings with the Administrator of Business Services and Director of Capital Projects. In addition, progress meetings are held with department staff and maintenance supervisors on a monthly basis or more often as needed.

Educational Specifications and Design Standards have been developed to guide the overall development including the definition of spaces, design goals, materials, and systems among other standards. These baseline documents help ensure consistency of project delivery, equity between schools, alignment with educational delivery and speed the design process.

The Program Management Plan serves as an overall guide for processes, procedures, levels of authority, communications, contracting, change orders, and documentation. Project and program status reporting throughout the organization is handled through regular emails and face to face meetings. Regular status updates are posted for public consumption on the district website.

Facility Advisory Committees (FAC) was created in 2001 and is comprised of approximately 20 members of multi-disciplinary internal and external members to include local citizens from across the district, school representatives, members of the city of Lakewood, military and industry experts to include architects and engineers. The FAC reviews and provides recommendations for short-term and long term facilities plans, educational adequacy schools, safety and security, future project planning, use of district property, and future capital bond propositions. The FAC has proven to be very effective for the school district in the passing of two bonds in 2006 and again in 2010.

Facility Condition Assessment Study In 2015 an extensive Building Condition Assessment study was conducted by Meng Analysis of all the district facilities to assist the district with planning and budgeting for major maintenance and future capital projects. Meng Analysis performed an assessment of each subsystem at each building to identify short-term Observed Deficiencies with a detailed itemization of each component that is in need of major maintenance or repair in order to maintain functionality and then assigned a cost to repair these components. They also prepared long-term Predicted Renewal Costs over a 20-year period based on predictive models and typical lifespan of systems. The information generated by this study was shared with the FAC in 2016 as this committee reviewed the district’s future capital plans. The outcome of this study will form the basis of the next capital bond.

Office of the Superintendent of Public Instruction (OSPI), a partner to the District, provides additional project controls and oversight. Regular updates and approvals are required from OSPI in order for the District to secure state funding assistance for projects that qualify. Updates and approvals include estimates, schedules, value engineering studies, constructability reviews, energy life cycle cost analysis and other regular deliverables.

Each project is directly overseen by the Director of Capital Projects/Sr. Project Manager, Bill Coon, including design input, delivery method decision and overall execution. The assigned Project Manager directs the day to day business of the project including meetings, decision support, documentation, payments, forecasting, FF&E purchasing and closeout. The Administrator of Business Services and Capital Projects in collaboration with the Director of Capital Projects/ Sr. Project Manager and Program Manager, support
the Project Manager with GC/CM procurement, contracting, change negotiations and program level reporting.

Graehm Wallace of Perkins-Coie provides the District with GC/CM contracting legal advice and contract documents.

4. **Personnel with Construction Experience Using various Contracting Procedures** *(RCW 39.10.270(2)(b)(ii.)) Limit response to two pages or less. (See attached sample to display personnel experience)*

Please provide a chart with your organization’s current personnel with construction experience using the contracting procedure and briefly describe their experience (for example, the type of project, the length of time they worked on the project, the tasks they performed, and the percent of time devoted to each task). Only identify those personnel that you reasonably expect will be with your organization over the next three years.

**See CPSD Project Team GC/CM Experience – Exhibit E**

**Project Team Chart:**

<table>
<thead>
<tr>
<th>Clover Park School District: Planning and Construction Staffing:</th>
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</thead>
<tbody>
<tr>
<td>Deborah LeBeau Superintendent</td>
</tr>
<tr>
<td>Rick Ring Administrator of Business Services</td>
</tr>
<tr>
<td>William Coon Director of Capital Projects &amp; Project Manager</td>
</tr>
<tr>
<td>Latanya Figueroa Purchasing Manager</td>
</tr>
<tr>
<td>Jim Dugan Program Manager, Parametrix</td>
</tr>
<tr>
<td>Dan Cody GC/CM Procurement PM/CM, Parametrix</td>
</tr>
<tr>
<td>Graehm Wallace Perkins-Coie, GC/CM Attorney</td>
</tr>
</tbody>
</table>

**Deborah LeBeau / Superintendent**

Debbie LeBeau became Superintendent of Clover Park School District in July 2008. She got her start in the district in 1996 as the supervisor of special education. Prior to her appointment as superintendent she served in six other administrative roles, including Deputy Superintendent from 2006 to 2008, giving her a wide breadth of experience in the central office and schools in the areas of instructional leadership and student achievement.

Ms. LeBeau will administer the needs of the School Board, provide insight and critical direction to all GC/CM projects with regard to district goals and project objectives, and be available to make timely decisions that affect project budget, schedule and quality outcomes.

Since 2012 Debbie has provided leadership direction during the planning and construction of six (6) GC/CM projects with a combined budget of more than $228 million. She also provided guidance on a multi-phase $80 million GC/CM project at Lakes High School from 2006 to 2011. She will continue to apply her extensive GC/CM experience to ensure that district goals are achieved on any future GC/CM project.
Rick Ring / Administrator for Business Services and Capital Projects

Rick joined the district in June 2014 and supervises the financial and business functions for the district including maintenance, operations, and transportation and capital projects. Rick is responsible for the oversight of all capital projects with direct involvement in every phase of project development including design, scheduling, budgeting, procurement, accounting and contracts. Rick completed the two-day GC/CM training workshop at the AGC in 2015.

Previously, Rick was the Chief Operations Officer/Assistant Superintendent of Operations from July 2005 to May 2014 for St. Vrain Valley School District in Longmont, Colorado where he was responsible for leading the day to day operations of the district including facilities maintenance and operations and capital projects. During his tenure with SVVSD he was responsible for overseeing more than $300 million in capital construction projects including two new high schools, five new elementary schools, and various complex remodel projects utilizing D/B/B and the GC/CM delivery models.

While at Clover Park School District, Rick has provided oversight for six GC/CM projects. Rick has considerable GC/CM experience and the technical background for leading the district through complex projects.

Bill Coon / Director of Capital Projects

Bill has an architectural degree in environmental design and over 36 years of industry experience including 20 years as a general contractor Project Manager supervising design/bid/build and negotiated contract work. Bill's experience includes, 11 years in the consulting industry as a Project Manager/Owner’s Representative, 2-1/2 years as Regional Coordinator for the Office of the Superintendent of Public Instruction, and most recently as Director of Capital Projects for Clover Park School District since April 2015. Bill completed the two-day GC/CM training workshop at the AGC in Seattle in early 2015.

At OSPI, Bill administered the School Construction Assistance Program (SCAP) for 10 GC/CM projects that included reviewing the GC/CM contracts and project documents for conformance to RCW 39.10. As an Owner’s Representative consultant, Bill spent 7 years assisting Highline School District with management oversight during the design and construction of 12 replacement schools. Utilizing the DBB and GC/CM delivery methods.

While at Clover Park School District, Bill has been actively involved with 4 GC/CM projects. Management of the recent GC/CM projects at CPSD was performed by OAC Services as a consultant to the district. Bill supervised the OAC staff and coordinated with the GC/CM contractors to manage costs and oversee project communications. Bill will do the same with PMX on future projects.

Bill’s background in the design and construction industry and his involvement with GC/CM projects is appropriate for his role as program manager, overseeing and managing a portfolio of complex projects that will utilize the GC/CM delivery method

Latanya Figueroa/ Purchasing Manager

Latanya has worked in procurement since 1992 and for school districts since 1997. She joined Clover Park School District in 2008 as the Purchasing Manager and has been actively involved in the contract management, budget oversight and procurement of all capital projects for the District, including 7 GC/CM projects. Additionally, Latanya and took on project management responsibilities to include the review and preparation of proposal documents and contracts to verify RCW 39.10 compliance and budget oversight, In 2015 she completed the two-day GC/CM training workshop at the AGC.

Latanya coordinated with each architect and GC/CM contractor in the preparation of documents for subcontractor bids and was essential in the incorporation of federal acquisition and grant award contract language into our federal GC/CM projects. She also coordinated the retention management of bid documents for audit purposes.
Latanya will continue to apply her considerable GC/CM experience in the preparation of contract documents and the management assistance of future GC/CM projects for the district.

**Jim Dugan, Program Manager & GC/CM Advisor**  
Jim has 39 years of design, construction, project management and program management experience including education, alternative delivery and public works experience – comprised of 19 years managing design/build projects, 9 years managing design teams inclusive of two large GC/CM projects, followed by 10 years in the Owners Representative role managing the design and construction of multiple GC/CM K-12 projects.

In his role as Program Manager, Jim coaches, mentors and supports project managers, advises on long term strategic planning and forecasting, all project delivery strategic decisions, GC/CM selection and ongoing advice and counsel on every aspect of the D/B/B, GC/CM and development program and plan.

In 2016, Jim was appointed to a 3-year term on the Washington States Project Review Committee (PRC) where he, along with colleagues from the construction industry and public agencies, volunteer their time to review applications, hear presentations and make recommendations on public entities wishing to utilize alternative construction delivery methods of GC/CM and Design/Build on publicly funded projects.

Jim is highly experienced in alternative project delivery utilizing both GC/CM and Design/Build. He has served as an Advisor for GC/CM Procurement Advisory Services and Project Management support for a number of Public Agencies and projects.

**Dan Cody, GC/CM Procurement & PM/CM**  
Dan is a Senior Construction Manager/Project Manager with Parametrix. A licensed architect, Dan has over 30 years of experience in the design and construction industry and has developed the ability to manage all phases of projects from programming through construction closeout. Dan has been heavily involved in design, production and construction administration for a large number and variety of educational, institutional, and commercial projects. Dan’s expertise includes programming, budget analysis, space planning/design, project team coordination, quality control review, and production and construction administration. He has extensive experience in the K-12 educational market, providing design and construction services on projects for numerous school districts in western Washington.

Dan successfully completed the AGC GC/CM training seminar in January 2016. Since that time he has been closely involved in the GC/CM procurement process of seven K-12 projects, totaling nearly $396M in total project cost, that will/are being delivered using the GC/CM delivery method. Dan has quickly become a proponent of the GC/CM delivery method and believes that it will soon become the preferred delivery method used by school districts and public agencies.

**Paul Popovich, Capital Projects Supervisor**  
Paul is an accomplished Sr. Project Manager and licensed architect with over 30 years of professional experience in the Pacific Northwest. His management style brings all parties together, developing solutions that meet a client’s facility needs including program overview, budget assessment, and scheduling coordination as well as specific task scheduling.

Paul’s recent GC/CM project experience includes Stewart Middle School and McCarver Elementary School, and Browns Point Elementary School, for Tacoma Public Schools. Paul has extensive experience coordinating with outside parties like the Historic Advisory Committee, the Office of Superintendent of Public Instruction (OSPI), and other governing agencies from inception through project closeout.
Other projects that Paul managed have included Wainwright Intermediate School, Jason Lee Middle School, both D/B/B projects, and Stadium High School, the first GC/CM projects for Tacoma Public Schools valued at greater than $20 million. Paul also provided project management and Owner’s Representative services for North Thurston Public Schools, which includes the phased renovations of South Bay Elementary and Chinook Middle Schools.

Joe Missel, Project Manager
Joe is a skilled project manager with 30 years of experience in complete development, scheduling, estimating, and management of up to six concurrent projects with costs ranging from $500,000 to $27 million. Joe’s experience encompasses a variety of project types including designing, managing, and constructing public and educational facilities and maintenance, as well as utility and infrastructure for private and government clients. He has led significant projects as the architectural project manager, and has led general construction efforts as a senior project manager. Joe is sensitive to the client’s perspective and strives to assist his clients in recognizing their goals, while providing a functional and financially responsible facility that will represent the owner’s character in the community.

Greg Stidham, Sr. Construction Manager
Greg has specialized experience in managing capital projects through the planning, design and construction of a variety of public facilities including buildings, utility infrastructure, and transportation projects. Greg has the diverse experience through his 32 year career of working for a contractor, a municipality, and now a consultant giving him the unique ability to view a project from multiple perspectives. Greg is skilled in tasks related to all phases of project development including project management, planning, design, construction, and closeout. He is also skilled in collaboration and coordination with stakeholders, public involvement, conflict resolution, claims mitigation, plans and specification development, and bid package preparation. Greg attributes his success in project management, engineering and construction to his awareness of the importance of emphasizing accuracy, feasibility, constructability, and cost effectiveness throughout the design and construction process.

Dale Stafford, Small Capital Project Manager
Dale has 23 years of varied experience in residential and commercial construction, construction inspection, condition assessment, design, and construction services. His responsibilities for construction services have included submittal review and construction observation and inspection with daily reporting. Dale is currently overseeing small capital projects for Tacoma Public Schools as part of their overall program. Also, he provides selection recommendation and evaluates a variety of potential products which supports his ability to develop bidding documents and plan while actively managing eight small capital projects. These projects vary from field/playground improvements to kitchen replacements or reconstruction of a single floor in a multi-story building.

Graehm Wallace, GC/CM Attorney
Graehm Wallace is a partner in the Seattle office of the law firm Perkins Coie LLP. Graehm has over 20 years of experience working in all areas of construction delivery methods, contract drafting and negotiating, including preconstruction, architectural, engineering, construction management, design-build (D/B), general contractor/construction manager (GC/CM), balance of plant (BOP), procurement, turn-key, consultant, bidding, advice during construction, claim prosecution, defense from initial claim analysis through discovery, mediation, alternative dispute resolution, arbitration or trial. Some but not all of Graehm’s K-12 clients include; Auburn School District, Tacoma Public Schools, North Thurston School District, Tumwater School District, Bainbridge Island School District, Central Kitsap School District, and Mount Vernon School District.
5. **Management Plan and Rationale for Alternative Contracting Projects (RCW 39.10.270 (2)(b)(iii).)** Limit response to one page or less. (See attached example of a management plan and rationale for using an alternative contracting procedure.)

Please provide your typical management plan or protocol that you would use to manage a GC/CM project. Your plan should address the typical roles, types of positions with specific responsibilities and also list any advisory or oversight roles (by expertise).

**CPSD GC/CM Project Organization Chart**
Roles and Responsibilities:

<table>
<thead>
<tr>
<th>Role</th>
<th>Responsibilities</th>
</tr>
</thead>
<tbody>
<tr>
<td>Superintendent</td>
<td>Approve proposed projects for development, secure funding, report to the public, voters and taxpayers.</td>
</tr>
<tr>
<td>Administrator of Business Services &amp; Capital Projects</td>
<td>Supervise all support services and oversee execution of projects. Approve capital project budgets, change orders and contract awards, modifications and acceptances for board approval. Approve project delivery method.</td>
</tr>
<tr>
<td>Director of Capital Projects/Sr. Project Manager</td>
<td>Supervise capital project decisions, execution and Capital Projects staffing. Concur/overrule delivery method determination by Program Manager. Approve design direction and submittals, project budgets, negotiate change orders and prepare contract awards, modifications and acceptances for Administrator of Business Services &amp; Capital Projects and Superintendent approval.</td>
</tr>
<tr>
<td>Legal Counsel</td>
<td>GC/CM contract preparation, legal advice and dispute resolution.</td>
</tr>
<tr>
<td>Program Manager</td>
<td>Oversee the execution of the program. Provide direction and recommendations to the Director and Project Managers. Oversight over all projects.</td>
</tr>
<tr>
<td>Project Manager/Construction Manager</td>
<td>Drive the day to day success of each project. Serve as primary point of contact with Architect and GC/CM</td>
</tr>
<tr>
<td>Architect</td>
<td>Lead designer and prime consultant for the design of projects. Contracted to CPSD</td>
</tr>
<tr>
<td>GC/CM</td>
<td>General Contractor/Construction Manager selected via qualifications and fee process. Contracted to CPSD</td>
</tr>
</tbody>
</table>

6. **Contracting Procedures (RCW 39.10.270 (2)(b).)** *(Limit responses to two pages or less.)* *(See attached example table of how to display construction history.)*

Please provide a table with the following information for a maximum of twenty-five (25) public works projects with a total cost of at least $5M each that your organization has managed over the past 10 years:

- Name of project
- Description of project
- Total project cost
- Method of delivery (GC/CM or other)
- Lead Design Firm (including current contact information)
- General Contractor or GC/CM (including current contact information)
- Planned construction start at authorization date
- Planned completion date
- Actual construction start date
- Actual completion date
- Reason for schedule overrun (if any)
- Original budget at authorization (not including land acquisition)
- Final Cost
- Reason for cost overrun (if any)

*If the public body has fewer than twenty-five (25) applicable projects, it may list projects under $5 million if they believe them to be relevant.

**If the public body has more than twenty-five (25) applicable projects, they should state the number of projects they have managed and provide a list of the twenty-five (25) projects it believes are most relevant.

See Clover Public Body Experience — Exhibit D
7. Demonstrated Success in managing at Least One Project Using the GC/CM Contracting Procedure within the Last Five Years (RCW 39.10.270 (2) (b).)
(Limit response to one page or less)

In addition to the information provided in response to Question 7 about projects that your organization has managed using the alternative contracting procedure, please provide a narrative discussion with the following information:

a. Appropriateness of the alternative contracting method used for the project(s).
b. Lessons learned from your experience.

Within the last five years (2012 – 2017) Clover Park School District has contracted for 6 GC/CM projects. All are complete and occupied with one project still in the process of closeout. All six schools are located on Joint Base Lewis-McChord (JBLM) and were funded by a combination of grants from the Department of Defense Office of Economic Adjustment (OEA) and Washington State OSPI School Construction Assistance Program. This created complexities with scheduling, phasing and coordination such that the projects benefited from involving a GC/CM contractor for each project. Complexities included:

- **Multiple jurisdictions** – the projects required review and oversight by Federal, State and Local agencies which required tight coordination between the district, design teams and the GC/CM contractor.
- **JBLM logistics** – the time consuming flow of labor and materials through JBLM gates required complex scheduling, phasing and coordination that a GC/CM contractor could best control.

The schools were as follows:

**Carter Lake Elementary School (2012 – 2014)**
- Total Project Budget: $31,146,555
- Actual Cost: $28,726,335
- GC/CM: Skanska
- Project Status: Complete and occupied
- APD Appropriateness: JBLM Complexities, Occupied Site
- Lessons Learned: Communication needs to be improved between stakeholders during design and the construction management team during construction

This project was a 71,155sf replacement elementary school constructed on an occupied site in three phases. It was completed on time and under budget.

**Hillside Elementary School (2012 – 2014)**
- Total Project Budget: $32,947,967
- Actual Cost: $30,365,905
- GC/CM: Skanska
- Project Status: Complete and occupied
- APD Appropriateness: JBLM Complexities, Occupied Site
- Lessons Learned: Consult Risk Management and maintenance staff early in design to identify potential safety issues in the building and site components

This project was a 77,144sf replacement elementary school constructed on an occupied site in three phases. It was completed on time and under budget.
Total Project Budget: $38,588,472
Actual Cost: $33,323,320
GC/CM: Korsmo
Project Status: Complete and occupied
APD Appropriateness: JBLM Complexities, Complex scheduling, phasing and coordination
Lessons Learned: Coordinate final FF&E layouts with power and data outlet locations to avoid conflicts

This project was a 79,566sf replacement elementary school constructed on a new site. Students were housed at Clarkmoor Elementary until the new school was complete. The new school was renamed Rainier Elementary. It was completed on time and under budget.

Total Project Budget: $35,707,527
Actual Cost: $30,271,636
GC/CM: Korsmo
Project Status: Complete and occupied
APD Appropriateness: JBLM Complexities, complex scheduling, phasing and coordination
Lessons Learned: The use of BIM software reduces system conflicts and errors

This project was a 70,147sf replacement elementary school constructed on a new site. Students were housed at Greenwood Elementary until the new school was complete. The new school was renamed Meriwether Elementary. It was completed on time and under budget.

Beachwood Elementary School (2014 – 2015)
Total Project Budget: $39,547,554
Actual Cost: $33,490,215
GC/CM: Skanska
Project Status: Complete and occupied
APD Appropriateness: JBLM Complexities, Occupied Site
Lessons Learned: Schedule commissioning of the elevator early for easier move-in to the 2nd floor

This project was a 71,143sf replacement elementary school constructed on an occupied site in three phases. Approximately 300,000 cubic yards of structural fill was required to balance the site. The site also abutted wetlands that could not be encroached. It was completed on time and under budget.

Total Project Budget: $50,377,281
Actual Cost: $47,965,528 / projected
GC/CM: Skanska
Project Status: Complete and occupied, project closeout in progress
APD Appropriateness: JBLM Complexities, complex scheduling, phasing and coordination
Lessons Learned: Review final site layout with transportation to avoid conflicts

This project was a replacement elementary school constructed on a new site. It was larger than a typical elementary school at 102,015sf in order to accommodate a large Special Education program requiring specialized spaces and equipment for occupational therapy, physical therapy, etc. The students remained at the existing Evergreen school until the new school was constructed. It was completed on time and under budget.
8. **Ability to Properly Manage the Public Body's Capital Facilities Plan**  
*(RCW 39.10.270 (2) (b).)*  
*Limit response to one page or less*

As part of this statutory requirement, the PRC needs to determine that the public body has the appropriate project planning and budgeting experience. In addition to the information that’s been requested in previous questions, please provide other information to assist the PRC to determine whether the organization has project planning and budgeting experience.

Clover Park School District has successfully planned and managed 12 major capital projects valued at over $450 million in capital improvements since 2006 with funds received from bonds in 2006 and 2010, WA state school construction assistance and DoD Office of Economic Adjustment. Half of these projects were executed or successfully completed with the current executive leadership team.

Relevant sections of RCW 39.10.270 are addressed below:

(2) A public body seeking certification for the general contractor/construction manager procedure must demonstrate successful management of at least one general contractor/ construction manager project within the previous five years.

Response: Clover Park School District has completed 7 successful GC/CM projects including six in the last five years. These were Lakes High School, Carter Lake, Hillside, Rainier, Meriwether, Beachwood and Evergreen Elementary schools.

(3) To certify a public body, the committee shall determine that the public body:

(a) Has the necessary experience and qualifications to determine which projects are appropriate:

Response: Led by Director of Capital Projects/Sr. Project Manager Bill Coon with oversight and controls by Administrator of Business Services Rick Ring. Clover Park School District has built an outstanding capital projects delivery team well versed in the statutes and best practices in project delivery.

(b) Has the necessary experience and qualifications to carry out the alternative contracting procedure including, but not limited to:

(i) Project delivery knowledge and experience;

Response: CPSD extensive project delivery knowledge and experienced is detailed throughout this application.

(ii) personnel with appropriate construction experience;

Response: CPSD Planning and Construction capital projects personnel with appropriate GC/CM project management and construction management include, but are not limited to Administrator of Business Services, Rick Ring, Director of Capital Projects/Sr. Project Manager Bill Coon, and Purchasing Manager Latanya Figueroa, additionally augmented by the consultant team Parametrix via Program Manager Jim Dugan.

(iii) a management plan and rationale for its alternative public works projects;

Response: The CPSD management plan mirrors and is compliant with RCW 39.10.340 on uses of GC/CM contracting. Rationale and processes are in place to determine and approve the most appropriate delivery method for each project.

(iv) demonstrated success in managing public works projects;

Response: CPSD has successfully delivered 12 large capital projects valued at approximately $450 million since 2006.

(v) the ability to properly manage its capital facilities plan including, but not limited to, appropriate project planning and budgeting experience;

Response: Since 2001 the district has convened an ongoing Facilities Advisory Committee to explore strategies to meet the growing capital needs, develop a Capital Facilities Plan, and identify future projects. In addition, in 2015 an extensive Building Condition Assessment study was conducted by Meng Analysis of all the district facilities to assist the district with planning and budgeting for major maintenance and capital projects. CPSD has the staff with
considerable project planning and budgeting experience to successfully manage any future project.

(vi) the ability to meet requirements of this chapter;
Response: Clover Park School District fully meets the requirement of this chapter as demonstrated in this application.

   (RCW 39.10.270 (2)(b)(vii).) (Limit response to one page or less.)

Please provide any information not presented in your answers to Questions 3-9 further demonstrating your organization’s ability to meet the requirements of this chapter.

The information provided as answers to Questions 3 through 9 clearly demonstrates that the Clover Park School District meets and exceeds the requirements of Chapter 39.10 of the Revised Codes of Washington.

Specifically in regards to RCW 39.10.270 (2)(b)(vii), the Clover Park School District:

- Has completed successfully more than one GC/CM project within the past five years
- Has the required project experience and knowledge
- Has personnel with the appropriate project and construction experience
- Has a Management Plan and rationale for its alternative public works projects
- Has demonstrated success in managing public works projects
- Has the ability to properly manage its capital facilities plan, and as such,
- Has proven that they meet the requirements of Chapter 39.10.

With Facilities Condition Assessments and the resultant scope definition and prioritization, as well as District Master Planning well under way, the Clover Park School District is now planning for their next capital improvements bond. Although subject to change in total value and timing, current District thinking is the next capital improvement bond will go to the voters in the Spring of 2018. The District envisions a capital bond in the $100 million dollar range comprised of multiple schools. The District does not have the benefit of a swing site to house students when existing schools are under construction. As such, all projects envisioned as part of the 2018 capital improvement bond program will be occupied sites – this is the primary reason the Clover Park School District is submitting this GC/CM Agency Certification application at this time. Work on an occupied site is one of the five statutory requirements for use of the GC/CM delivery method, thus satisfying the first of two requirements.

The second requirement is in regards to the Public Benefit. The Public Benefit component is primarily satisfied regarding improved fiscal management and cost control. Over the past few months of 2017, the bid market has gone to capacity regarding projects and contractors that work in the $20 M to $40 M range. $20 M MACC projects planned in 2013 to 2015, were budgeted in the $280/sf to $300/sf range. As of January of 2017, that had escalated to $310/sf to $330/sf. Most recently, bid results for new construction elementary schools in the Puget Sound region have broken the $500/sf ceiling – an increase in bid construction costs in the 40% to 60% range over budget and plan. Demand has grossly exceeded supply, costs have risen and continue to rise.

With more than $10 B in K-12 work pumped into Washington State from 2011 to now (comprised of projects that develop thru 2020), and, with more than $5 B in planning across the State between now and 2022 (comprised of projects that develop thru 2028), we do not anticipate costs to decline for the foreseeable future. Of the tools that are available, the GC/CM delivery method is the best tool for a public body to use to work collaboratively with a development team to mitigate cost risk as much as possible – something the bid method does not provide.
To further augment and enhance its outstanding internal capabilities, the District has chosen to team with external professional project and construction management consulting firms. This successful teaming model is executed with internal and consultant staff members co-located at the District offices, where regular strategy and weekly staff and project meetings are held. Currently contracted with Parametrix, one of Washington’s experienced GC/CM project leadership teams, the District is ideally positioned to select GC/CM delivery when appropriate and execute the GC/CM projects successfully on time and on budget and fully compliant with the requirements of RCW 39.10. If and when additional PM or CM or other types of roles and services are needed, they will be provided by Parametrix. The document tool by which the District will begin and fulfill this self-determination of an appropriate project delivery method is provided for your review as an Exhibit to this application.

10. **Resolution of Audit Findings on Previous Public Works Projects** *(RCW 39.10.270 (2)(c.).)* *(Limit Response to one page or less.)*

   If your organization had audit findings on any project identified in your response to Question 6, please specify the project, briefly state those findings, and describe how your organization resolved them.

   **Response:** The District has received no audit findings on any projects identified above.
Respectfully Submitted,

Mr. William Coon  
Director of Capital Projects/Sr. PM  
Clover Park School District

[Signature]

July 3, 2017

Exhibits:

Exhibit A: Delivery Method Recommendation  
Exhibit B: GC/CM Project Photo's  
Exhibit C: Planning & Construction Organizational Chart  
Exhibit D: Clover Park School District Historical Project Experience  
Exhibit E: Clover Park School District Team Experience
RECOMMENDATION FOR PROJECT APPROVAL TO USE THE GENERAL CONTRACTOR/CONSTRUCTION MANAGER (GC/CM) CONTRACTING PROCEDURE
Internal Review and Approval Form

Project Name: 

Project Construction Cost: 

Anticipated Construction Start Date: 

Anticipated Occupancy Date: 

In order to qualify to use the GC/CM contracting procedure, projects must meet at least one of the following criteria:

1. If the implementation of the project involves complex scheduling, phasing or coordination, what are the complexities?

2. If the project involves construction at an existing facility that must continue to operate during construction, what are the operational impacts on the 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 drawings or sketches.

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

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

5. 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?

6. 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?
Provide a detailed explanation of why use of the GC/CM contracting procedure is appropriate for the proposed project:

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 example, your description must address, but is not limited to:

1. How this contracting method provides a substantial fiscal benefit, or

2. 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.

3. In the case of heavy civil GC/CM, describe why and/or how the heavy civil contracting procedure serves the public interest.
GC/CM Delivery Method Recommended by:

PROJECT MANAGER

Date: ____________

Clover Park School District

GC/CM Delivery Method Recommendation Confirmation:

LATANYA FIGUEROA

Date: ____________

Purchasing Manager

Clover Park School District

GC/CM Delivery Method Director Level Approval:

WILLIAM COON

Date: ____________

Director of Capital Projects & Project Manager

Clover Park School District

GC/CM Delivery Method Superintendent Final Approval:

Date: ____________

RICK RING

Administrator of Business Services & Capital Project

Clover Park School District
**Lakes High School**
The Lakes High School was a replacement and modernization project designed to accommodate 1,500 students with over 230,000 SF of new buildings, renovations, and site improvements. The new Lakes High School was constructed on the existing school site such that the existing school could remain in operation during construction. The project was completed in three phases: phase 1 included construction of the Pathways Building that included a Performing Arts Center, science labs, classrooms, computer labs, and a portion of the library, Phase 2 included the gym, pool, more classrooms, and administration offices, and phase 3 was the fields, tennis courts, and parking. The project was completed on time and under budget.
Carter Lake Elementary
The Carter Lake Elementary replacement projects was designed to house 500 students with a new covered play area and over 66,000 SF of new buildings. Also, this project intended to consolidate the existing Carter Lake and Heartwood elementary schools. It was constructed on the existing Carter Lake site such that the existing Carter Lake school could remain in operation during construction. The project was completed in three phases: phase 1 included site work and construction of the new school, in phase 2 the students occupied the new school building and the old school was demolished, and phase 3 was the development of the fields and parking. The project was completed on time and under budget.
**Hillside Elementary**
The Hillside Elementary replacement project was designed to accommodate 650 students with a new covered play area and nearly 73,000 SF of new buildings. The new Hillside Elementary School replaced the existing school and was constructed on the existing Hillside site such that the existing school could remain in operation during construction. The project was completed in three phases: phase 1 included demolition of the Covered Playshed, site work and construction of the new school, in phase 2 the students occupied the new school building and the old school was demolished, and phase 3 was the development of the fields and parking. The project was completed on time and under budget.
Rainier Elementary
The Rainier Elementary replacement project was designed to accommodate 650 students with a new covered play area and over 77,000 SF of new buildings. The new Rainier Elementary School replaced the existing Clarkmoor Elementary and was constructed on a new site near the existing Clarkmoor. The project was completed in multiple phases consisting of the new building construction and site development work. The existing Clarkmoor facility was turned over to JBLM for re-purposing after the new building was occupied. The new school was renamed Rainier Elementary. The project was completed on time and under budget.
Meriwether Elementary
The Meriwether Elementary replacement project was designed to accommodate 450 students with a new covered play area and 67,747 SF of new buildings. The new Meriwether Elementary School replaced the existing Greenwood Elementary and was constructed on a new unoccupied site in the Lewis North housing area. The existing Greenwood facility was later demolished after the new building was occupied. The new school was renamed Meriwether Elementary. The project was completed on time and under budget.
Beachwood Elementary
The Beachwood Elementary replacement project was designed to house 450 students with a new covered play area and 66,743 SF of new buildings. The new Beachwood Elementary School replaced the existing school and was constructed on the existing site. Students were temporarily housed at an interim school during construction. The project was completed in multiple phases consisting of new construction, demolition of the existing school and site development. Approximately 300,000 cubic yards of structural fill was required to balance the site which also abutted wetlands that could not be encroached. The project was completed on time and under budget.
**Evergreen Elementary**
The Evergreen Elementary replacement project was designed to accommodate over 761 students with a new covered play area and 97,757 SF of new buildings. The new Evergreen school was constructed on a new vacant site across the street from the existing school. It was designed larger than a typical elementary school in order to accommodate a extensive Special Education program requiring specialized spaces and equipment for occupational therapy, physical therapy, etc. The students remained at the existing Evergreen school until the new school was constructed. The project is currently in closeout and was completed on time and under budget.
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