# Evergreen School District No. 114

GC/CM Application

Sifton Elementary Replacement Project

April 20, 2018

Evergreen Public Schools

April 20, 2018

Project Review Committee
c/o State of Washington Department of Enterprise Services,
Engineering & Architectural Services
P.O. Box 41476
Olympia, Washington 98504-1476

Attention: Talia Baker, Administrative Support

Re: Evergreen School District No. 114 GC/CM Application for Sifton Elementary School Replacement Project

Dear PRC Members:

We are excited to apply for approval for Evergreen Public Schools (EPS) to utilize the GC/CM project delivery method for our replacement project for Sifton Elementary School on the same site.

The EPS community passed a bond in 2018 to fund capital facility improvements to address building conditions and tremendous growth in eight different services areas of our district. Sifton Elementary School is one of our target sites. In recent years, we have seen a steady growth in this service area such that we now have 8 modular units on site. The replacement school on the same site will address past and projected growth for the Sifton neighborhoods.

We feel our project is appropriate for GC/CM and, per RCW 39.10.340, qualifies for approval based on:

- ✓ the need for complex scheduling and phasing
- ✓ construction at an occupied facility
- ✓ the success of the project requires GC/CM participation early in the design phase
- ✓ the project encompasses a complex work environment

I was fortunate to be engaged in three of our prior projects, including Evergreen High School Addition and Renovation, which, was one of ten pilot GC/CM demonstration projects selected by OSPI in September 2002. Our team, which includes LSW Architects and R&C Management, have been trained in and have extensive experience utilizing the GC/CM process. We have also assembled additional GC/CM experts as team members: Parametrix will assist R&C Management through the GC/CM selection process and will supply project management on an as-needed basis, and Graehm Wallace of Perkins Coie LLP will provide legal assistance.

Thank you for your consideration of our application. We look forward to meeting with the PRC on May 24th and responding to any questions you may have about the project.

Sincerely,

Susan Steinbrenner
Executive Director of Facilities

Enclosure: EPS Application and Exhibits

13501 NE 28th Street ● PO Box 8910 ● Vancouver, WA 98668-8910 ● Facilities Dept. ● PHONE (360) 604-4077 ● FAX (360) 604-4112
www.evergreenps.org

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## IDENTIFICATION OF APPLICANT

**a) Legal name of Public Body:** Evergreen School District No. 114

**b) Address:** 13501 NE 28th Street, P.O. Box 8910, Vancouver, WA, 98668

**c) Contact Person Name:** Susan Steinbrenner **Title:** Executive Director of Facilities

**d) Phone Number:** (360) 604-4077 **Fax:** (360)604-4112
**E-mail:** susan.steinbrenner@evergreenps.org

## 1. BRIEF DESCRIPTION OF PROPOSED PROJECT

**a) Name of Project:** Sifton Elementary School Replacement

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

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

Sifton Elementary School, opened in 1958 at just under 19,000 square feet. Two separate buildings were added in the 1960's for a total of 37,822 sf of bricks/mortar construction. Rapid growth in the late 1980's and early 1990's combined with 9 failed bond measures resulted in placement of 8 portable classrooms for total of 50,366 sf. A covered play shelter was added in 2003. Existing site development includes playgrounds (hard and soft surface), parking, bus drive, student garden, sports fields, and a walking track.

The new 62,000 square foot replacement school will be rebuilt on site, and students will occupy the current building during construction. The new structure includes a 2-story classroom wing, gymnasium, kitchen & cafeteria, media center, front offices, support space, collaboration areas, and a covered play shelter. Site development will replace existing development and create separation between bus and vehicular traffic to allow parent drop off / pick up area that is separate from the bus turnaround. The new site will also have a longer on-site cuing area to reduce congestion on the street and in the neighborhood.

## 2. PROJECTED TOTAL COST FOR THE PROJECT

### A. Project Budget

| | | |
|---|---|---|
| Costs for Professional Services | $ | 3,421,586 |
| Estimated Project Construction Costs | $ | 25,444,747 |
| Equipment and Furnishing Costs | $ | 1,388,425 |
| Off-Site Costs | $ | 100,000 |
| Contract Administration Costs | $ | 600,000 |
| Contingency - GC/CM | $ | 1,500,000 |
| Contingency - Owner | $ | 1,800,000 |
| Other Related Project Costs | $ | 225,000 |
| Sales Tax | $ | 2,262,387 |
| **TOTAL** | $ | 36,742,145 |

### B. Funding Status

**Please describe the funding status for the whole project.**

This project budget is fully funded. Funding for has been secured through the passage of the $695,000,000 capital improvement bond on February 13, 2018, estimated state School Construction Assistance Program funds of $5,500,000, and a portion of already collected local impact fees.

## 3. ANTICIPATED PROJECT DESIGN AND CONSTRUCTION SCHEDULE

**The anticipated project design and construction schedule, including (1) procurement; (2) hiring consultants if not already hired; and (3) employing staff or hiring consultants to manage the project if not already employed or hired.**

| NEW ELEMENTARY SCHOOL PROJECT SCHEDULE | | |
|---|---|---|
| **Activity** | **Estimated Start** | **Estimated Completion** |
| **GC/CM Procurement** | | |
| STEP ONE (Statement of Qualifications) | 5/24/18 | 6/25/18 |
| PRC Meeting / Approval | 5/24/18 | 5/24/18 |
| Public Advertisement | 5/31/18 | 6/7/18 |
| Mandatory Information Meeting/Site Tour | 6/8/18 | 6/8/18 |
| Last Day for Questions | 6/11/18 | 6/11/18 |
| Addendum Issued | 6/13/18 | 6/13/18 |
| RFQ/P Responses Due | 6/20/18 | 6/20/18 |
| Initial Screening & Short Listing | 6/22/18 | 6/22/18 |
| Notifications Sent to Shortlisted Firms | 6/25/18 | 6/25/18 |
| STEP TWO (Interviews) | 6/25/18 | 7/5/18 |
| Interviews Conducted | 7/5/18 | 7/5/18 |
| District Evaluate / Shortlist | 7/5/18 | 7/5/18 |
| STEP THREE (RFFP – Pricing) | 7/6/18 | 8/14/18 |
| Issue RFFP to Shortlist GC/CM Firms | 7/6/18 | 7/6/18 |
| RFFP Sealed Fee Proposals Received & Publicly Opened | 7/12/18 | 7/12/18 |
| District Review / Select | 7/13/18 | 7/13/18 |
| NOI to Award | 7/16/18 | 7/16/18 |
| Negotiate Preconstruction Services Agreement | 7/16/18 | 7/23/18 |
| Special Board Meeting Approval | 8/14/18 | 8/14/18 |
| **DESIGN ACTIVITIES** | | |
| Programming (Ed Specs) | 3/20/18 | 5/1/18 |
| Schematic Design | 5/1/18 | 8/15/18 |
| Design Development | 8/15/18 | 11/30/18 |
| Construction Documents | 11/30/18 | 3/31/19 |
| **AGENCY PROCESS – CITY AND COUNTY** | | |
| Agency Review / Early Sitework Permit | 3/18/19 | 4/17/19 |
| Agency Review / Foundations & Structural Steel | 3/31/19 | 5/30/19 |
| Agency Review / Building Permit | 5/30/19 | 7/25/19 |
| **CONSTRUCTION** | | |
| Early Sitework Bidding | 3/18/19 | 4/17/19 |
| Early Sitework Construction | 5/15/19 | 9/27/19 |
| Subcontractor Bidding | 4/15/19 | 8/30/19 |
| Construction | 5/15/19 | 7/31/20 |
| Substantial Completion | 7/31/20 | 7/31/20 |
| Punch List/Final Completion/Closeout | 7/31/20 | 8/31/20 |
| Owner Move in | 7/31/20 | 8/31/20 |
| First Day of School | 9/2/20 | 9/2/20 |
| Warranty Period | 7/31/20 | 7/31/21 |

## 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 the implementation of the project involves complex scheduling, phasing, or coordination, what are the complexities?**

The District needs a GC/CM that fully understands and shares the District's commitment to the educational process and participates in the planning process to minimize impacts prior to bidding so as to be included in the overall costs. A GC/CM must shift work activities, make accommodations for short-term District needs, support the District's goal to provide a quality learning environment, and accommodate community activities.

- *Existing school will remain occupied*.
  Construction must be phased to allow the existing facility to remain in full use during the school year which requires detailed phasing plans to allow ongoing education as well as ensure the safety and security of all students, staff and public.

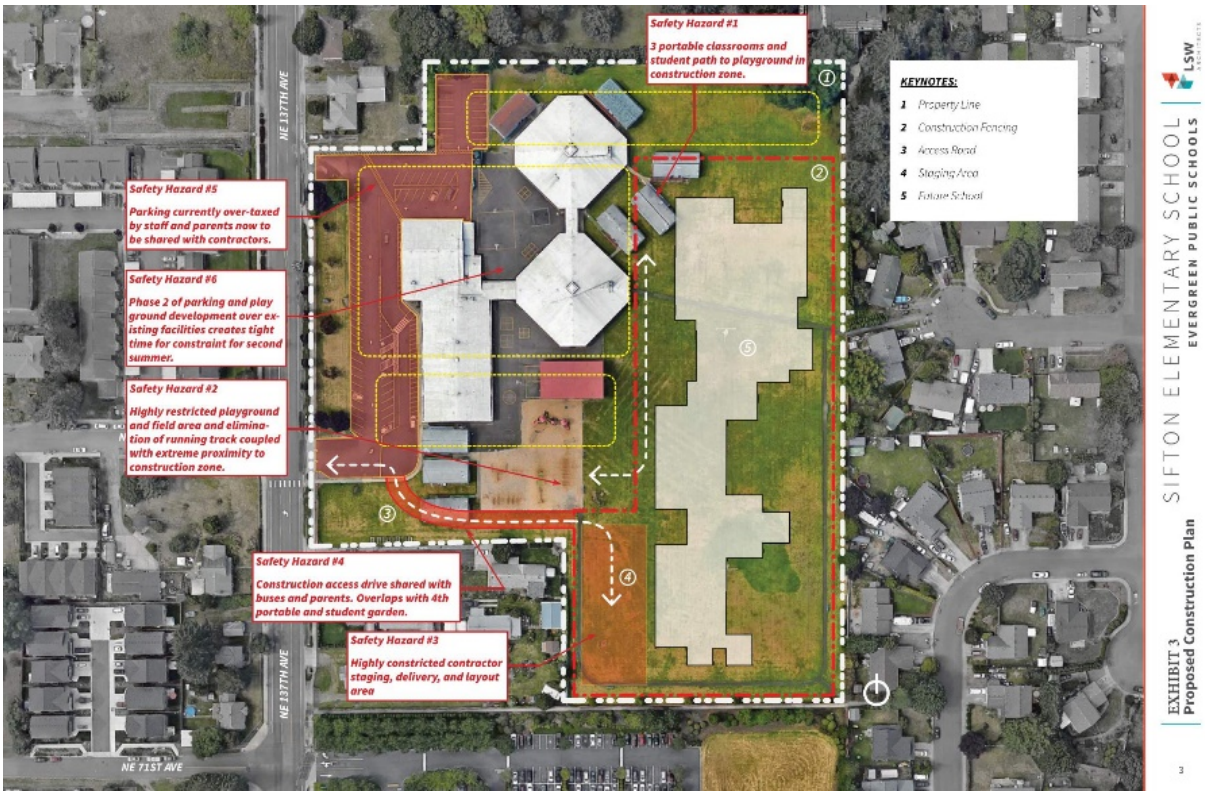



Exhibit 3

❖ *Required detailed micro-phasing.*

Phasing of the work becomes critical in that the majority of the site development will take place on existing building footprints not available till the new facility is completed.

- Early pre-construction activities must take place to make temporary accommodations for program areas that overlap with early construction.
- Multiple items must be coordinated and addressed at each phase of construction: Student ingress/egress, access to playfield/ballfields, delivery and pickup of students, building demolition, and site utility locate/relocate.
- The 2020 summer phase will have an associated scope of work that cannot be started till the existing school is no longer in use, including abatement, demolition, and grading, followed by new parking lots, drives, playgrounds, and fields.

Having a GC/CM on board to strategize, document, and implement these early activities and incorporate ongoing requirements into the bidding documents is critical.

❖ *Constrained and Complex Scheduling.*

The volume of work necessary to replace an under-sized school facility on an occupied site without impacting the educational delivery requires a master schedule with multiple immovable milestone dates. See Exhibit 3 for further clarity.

- Four (4) modular structures are in the construction or construction access zone and must be moved prior to construction activity so as to maximize the dry weather construction window. As these are occupied structures, this limits those activities to small school break windows with GC/CM site and utility preparation and coordination to minimize down time.
- Work start and end times, material deliveries, and concrete pours must straddle parent and bus drop off and pick up periods due to use of the same drives and parking areas.
- Due to proximity, large scale erections and crane operations must be scheduled outside of occupied and play periods.
- Due to occupancy and size restrictions of the site, the schedule for emptying the existing building, abatement, demolition, grading, new parking, new playgrounds and fields, and new site circulation is limited to a 10-week window at the second summer, requiring the new facility to be occupiable by June, thus requiring an early, phased, start date for material pre-purchase and rough grading and concrete.

Engaging a GC/CM in design phases as early as schematic design will literally shape the footprint and placement of the building and site infrastructure to allow those milestones and phasing to be met.

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

- *Safety of students, staff and public.*

  This site will continue to be fully occupied by over 500 students and parents. The District is at over-capacity and moving students to other sites is not an option. Student and public safety is critical. **We have identified 6 major safety hazards on the project. Each hazard involves a direct impact between the public and construction. Those hazards are defined in Exhibit 3 as follows:**

  - Portables in Construction Zone
  - Constricted Play Area
  - Limited Contractor Staging
  - Overlapping Traffic Patterns
  - Inadequate Parking
  - Site Development Over Existing Building Footprint

  - All construction traffic will flow through the occupied school site at the same drives as buses and parent vehicles. The school site has existing safety issues with conflicting morning and after-school bus and parent drop off and pick up drive patterns as well as scheduling District and community activities on the site that would have construction traffic added to this. The previous addition of 8 portable structures further illustrates the already over-crowded conditions.
  - The student travel paths to and from the playgrounds, fields, running path, covered play shelter, portables, and student garden are all in direct conflict with the construction operations. See Exhibit 3.

  The existing confusion will only be compounded without multiple logistical work sessions incorporated into the design process and eventual design documents to create a total understanding and collaboration between the District and the GC/CM.

- *Complex Schedule.*

  The District intends to maintain its commitment to educating students in a learning environment that is not compromised by construction activities.

  - Construction activities need to be scheduled to allow for some quiet times for critical activities such as testing periods, given the construction activities will occur, in some cases, 20' from classrooms.
  - Work that compromises student safety needs to be scheduled when the school is not occupied.
  - Additionally, some school wide activities require additional site parking for the community. The GC/CM's parking and staging areas need to be shared for those activities.

  Again, the District needs a GC/CM that fully understands and shares the District's commitment to the educational process and participates in the planning process to minimize impacts prior to bidding so as to be included in the overall costs. The flexibility of a GC/CM that understands the District's needs and can respond

immediately by shifting work activities and making accommodations for other short-term District needs will support the District's goal to provide a quality learning environment for students and staff as well as accommodate community activities.

- *Existing programs.*
  The school population has outgrown its existing site and only through replacement with a 2-story building can the district continue its use, but the construction period will greatly impact our ability to provide all offerings.
  - Programs in 8 of the 16 rooms of the existing 8 portables will be impacted by a direct conflict with construction activities
  - Playfields will be minimized by construction activity, impacting physical education requirements
  - An existing large student garden is in the path of the needed construction access.
  - The running path runs right through the proposed new building site.

  Having a GC/CM on board during the early planning is essential to creating a work plan that supports the relocation or access to these essential program areas.

- *Existing services.*
  Since the school plans to keep the existing facility until the completion of the new project, the integration and phasing of new utilities including water, sewer, communications, fire alarm, and security require careful consideration and coordination and confirmation of as-builts. Coordination of services must be built into the bidding documents by not only architects and engineering, but a GC/CM with access to hands-on mechanical and electrical resources.

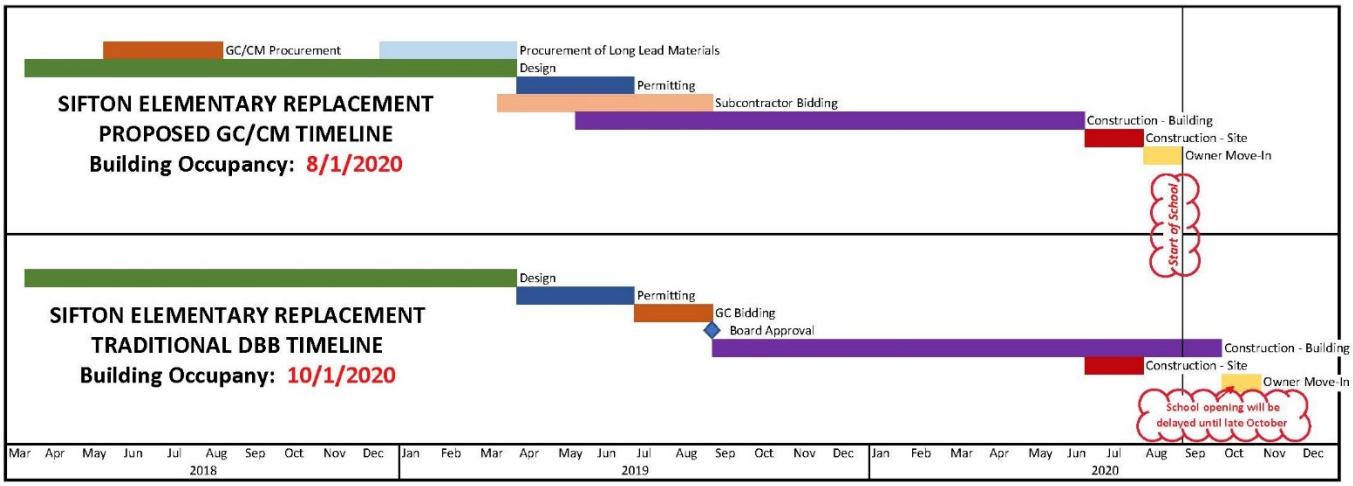
**If involvement of the GC/CM is critical during the design phase, why is this involvement critical?**

- *Actual design implications*
  To meet the above stated constraints for safety, schedule, and phasing, the GC/CM will conduct multiple real-time constructability reviews that are informed by activity durations, safe work zone sizes, and delivery and erection logistics. The analysis of these components may have a direct impact on the shape and location of the building footprint as well as material choices, building heights, and systems design. The confines of the site and its occupied state will force some choices that a green field development would not otherwise face.
  Early involvement of the GC/CM is necessary to perform site investigations and to gather and process site information from a contractor's point of view. This process will allow informed design decisions, maximize efficiencies, and streamline the construction process.

- *Budget control*
  The GC/CM will be responsible for cost estimation and cost control during the design phase. With the Owner's budget derived from bond proceeds, it will be essential that, throughout the design process, the GC/CM provides continuous cost estimation,

value analysis and constructability to ensure the final cost of construction is responsibly within the budget.

- *Early material procurement.*
  The early involvement of the GC/CM will provide the opportunity for long lead materials to be procured during the design process as necessary to meet the project schedule. We are in the early planning stages of determining what materials may be needed but may include steel fabrication, storm system infrastructure, and mezzanine-specific mechanical units. The project's critical path flows through the early procurement of these packages (and others to be determined). With the assistance of the GC/CM, it will allow the project to be completed in the 13-month project schedule by procuring materials as much as 3 months earlier than a traditional Deign-Bid-Build and limit impacts to a single school year. With a limited time-frame for construction, the GC/CM will be able to review and order materials prior to the 100% completion of the construction drawings.




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

- *Complexity*
  The complexity of the work environment is summed up by two primary concerns: site logistics and student safety. How do we safely construct our new facility while the contractor is just feet away from students, ranging in age from five to twelve years-old? When the existing sports fields are included, this age group expands from infants to the oldest of our population.
- *Questions* that arise at the site that would uniquely benefit from a GC/CM approach include:
  A. On a limited site where will the walking track be relocated since the new construction will displace it?
  B. Where will construction staging and parking be placed, bearing in mind that the other relatively flat areas on the site are occupied by the existing school

and parking? These will need to be closely coordinated with the GC/CM to allow construction to proceed efficiently.

C. What is the best plan to abate and demolish the existing building and construct new parking lots in a 2.5-month summer window?
D. How and when do we demo existing buildings, build new buildings, route utilities while still maintaining student/staff safety, egress, and fire/emergency access?
E. Knowing that we have limitations with site work, weather and permitting, where do we start construction and how do we maximize buildable weather conditions?

- *Summary*
  When looking at the project as a whole, the complexity and technical aspects are really a sum of their parts. Site size, soil conditions, needs for ball field use, busing, on-site work, off-site work, student access, parking, contractor's staging, inner area construction, hazardous materials abatement and permitting are all to be completed while maintaining the safety and education of the Evergreen students. This will require close coordination and input from the GC/CM which will be critical to the overall success of the project.

**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?**

No specialized work related to historical significance is anticipated on this project.

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

**How this contracting method provides substantial fiscal benefit:**

The traditional method of awarding contracts in a lump sum is not practical for meeting desired quality standards or delivery schedules for the following reasons:

- *Reduced costs*
  We are experiencing periods of high construction escalation, so time is of the essence. It is expected that bringing the GC/CM onto the team early to aid with phasing and scheduling, confirm on-site utility as-builts and to issue early subcontractor bid packaging will reduce the construction time line by at least 3 months allowing for a planned building completion date of June 4, 2020. This will allow the existing facility demolition and site work to occur over the summer of 2020, assuring an unhindered school opening. Costs thus reduced by:

- Reducing exposure to inflation
- Material orders outside of peak demand windows
- More construction in optimal weather conditions with less de-watering and winterization
- Reduced General Conditions
- Less over-lapping sub-trade activities

❖ *Reduced risks*

Releasing early bid packages such as an early steel package and an early site package will offer substantial benefits to the public. Early bid packages will allow long lead materials to be pre-ordered, reducing scheduling risks and decreasing cost premiums due to compressed schedules. “Locking in” a civil subcontractor in early spring 2019, when quality civil subcontractors still have capacity to take on summer work rather than waiting for complete documents to be prepared, will allow for better up front planning and risk management as well as increase competition by having civil work bid in the Spring, which historically produces lower bid results than waiting to bid in early Summer- a much less competitive bid environment.

❖ *Reducing unforeseen conditions*

Bringing the GC/CM team onboard during the design phase will provide financial benefits by allowing additional time for investigation of potential pitfalls with utility conflicts, unknown building conditions, and challenging site conditions and hence reducing unforeseen conditions during the construction phase when schedules are tight and would require overtime costs to overcome those obstacles.

❖ *Public safety concerns*

An experienced and carefully selected GC/CM will greatly reduce impacts to the school and surrounding community. The GC/CM must have outstanding safety programs, experience managing construction with students on site, and schedule and phasing coordination. Safety protocols outlined, prioritized, developed, and vetted prior to bidding will ensure cost-effective implementation. Sub-contract bidders will include these as base conditions rather than as ongoing ever-changing sets of parameters post-bid. This will minimize cost claims.

❖ *Site complexity*

The Sifton Elementary Replacement Project is on a tightly constrained site. The site will be fully occupied throughout the school year. Parking and athletic fields will be absorbed by construction activities with little or no room for contractor staging and laydown area. The use of a GCCM to produce a phasing and mobilization milestone schedule as part of the initial bid package, eliminates construction phase cost claims for shifting staging conditions.

**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:**

The public interest is best served by providing projects that are both cost-effective and built with safety of the public as a priority. The "design-bid-build method" will be used on many of the Capital Improvements Projects approved on the bond levy. However, on this occupied-site project, the GC/CM process provides the best opportunity to achieve a safe project managed by a team with a proven record of success on projects with difficult time and site constraints. The District feels that the complexities and size of this site and the safety challenges as outlined in this document would be very difficult to fully explain and/or portray through the plans and specifications. The design-bid-build method of delivery does not provide the opportunity for collaboration necessary for success on this project.

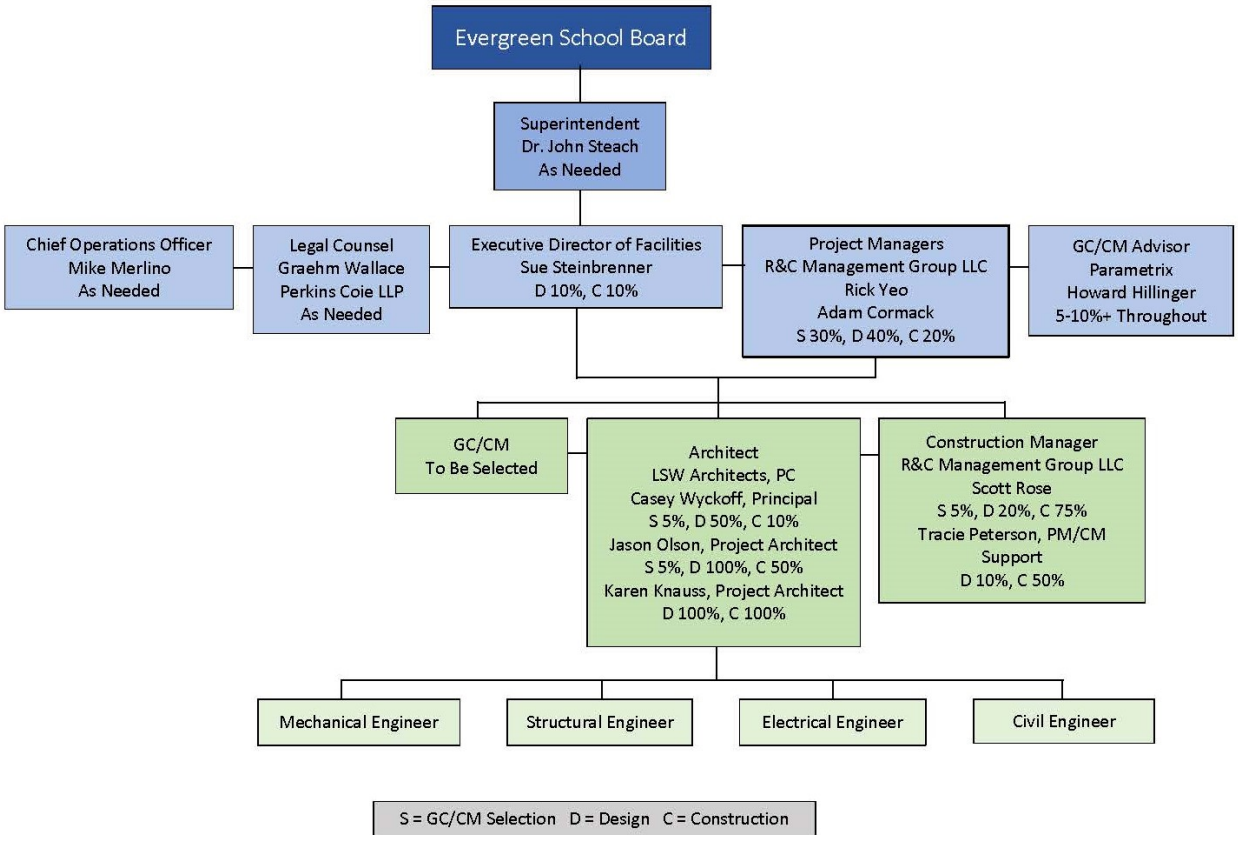
## 6. PUBLIC BODY QUALIFICATIONS

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

Evergreen Public Schools has experience using GC/CM contracting with the 2002 modernization of Evergreen High School and the 2014 replacement of Crestline Elementary using a modified GC/CM process. Crestline was lost to a substantial fire in 2013, so the district declared an emergency and waived the competitive bidding and other requirements of RCW 28A.335.190 and RCW 39.04 in order to expedite replacement of the school. With legal advice from Perkins Coie, the district determined that the best process for an efficient recovery and quality replacement at the lowest cost to the community was a cost-plus contract with a guaranteed maximum price, together with preconstruction services, which is very similar to the statutory GC/CM process. Similarities to the statutory GC/CM process in RCW 39.10 included 1) the use of an RFP to select the general contractor, 2) common contract forms (based on AIA A133 Agreement and A201 General Conditions), and 3) maintenance of statutory requirements for public work such as prevailing wages, retention, bonds, etc. Major differences from the statutory GC/CM process included 1) a shorter length of time before the start of construction, 2) maintaining competition by bidding among at least three prequalified subcontractors (instead of open subcontractor bid packages), and 3) reducing potential problems in negotiated support services so that specific workers were reimbursed for actual costs at specific rates. The results allowed for a temporary school to open in a warehouse 6 months after the fire, and a new, 62,000 sf facility opened 12 months later!

Susan Steinbrenner, EPS Executive Director of Facilities, was personally involved in both projects, gaining valuable insights to the GC/CM process. Understanding the need for experienced professionals to manage a $695,000,000 bond program, Steinbrenner turned to firms with a proven record of school design and construction management under various delivery methods, including GC/CM. LSW Architects, R&C Management, our legal counsel Perkins Coie, and our program advisor Parametrix, have extensive experience in the GC/CM contracts and delivery method.

**A Project organization chart, showing all existing or planned staff and consultant roles.**




**Staff and consultant short biographies. Provide the experience <u>and role</u> 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.**

**<u>Evergreen Public Schools</u>**

**Susan Steinbrenner**, Executive Director of Facilities. In 1985, after receiving a BA in Architecture and BS in Building Construction, Susan went to work in the private sector for a large general contractor performing all aspects of construction management from cost/scheduling engineer, project management, to superintendent of a variety of construction projects ranging from tenant improvements to the construction of a 56-story high rise in downtown Seattle. In 2003 Susan was hired as Capital Project Manager at Evergreen Public Schools to manage the capital renewal portion of Evergreen's 2002 bond package. In her work at Evergreen, she managed the remodel and new construction of several large school projects. In 2010, Susan was promoted to Director of Facilities and managed the construction of a new High School, additions to the Clark County Skills Center, and the emergency replacement of an elementary school that was lost to fire.

| Project Names | Project Size | Project Type | Role During Project Phases | | |
|---|---|---|---|---|---|
| | | | Planning | Design | Construction |
| Evergreen High School Additions and Modernization | $37.8M | GC/CM | N/A | N/A | PM |
| Crestline Elementary School | $18.8M | Modified GC/CM | Dir. Of Facilities | Dir. Of Facilities | Dir. Of Facilities |
| Temporary Crestline Elementary School | $1.1M | Cost Plus a fixed GMP (emergency resolution) | Dir. Of Facilities | Dir. Of Facilities | Dir. Of Facilities |
| Cascadia Tech Academy (formerly Clark Co. Skills Center) | $7.3M | DBB | Dir. Of Facilities | Dir. Of Facilities | Dir. Of Facilities |
| HeLa High School | $18.3M | DBB | Dir. Of Facilities | Dir. Of Facilities | Dir. Of Facilities |
| Annual Capital Renewal Projects | $5-$7M | DBB | Dir. Of Facilities | Dir. Of Facilities | Dir. Of Facilities |

## R&C Management Group, LLC

**Rick Yeo**, Partner, Project Manager. Founded R&C Management, LLC to provide effective and experienced management to clients. Rick brings extensive GC/CM experience to the project team, including successful completion of industrial, educational, medical, and commercial projects valued at up to 90 million dollars. Supplied either Oversight or Project Management on over 300 educational projects over the last 45 years in varying roles culminating as President of Robinson Construction, a leading contractor active in the Oregon and Washington school construction markets. Prepared program and project budgets and schedules, contracting strategies, and project control documents. LEED Accredited Professional. Rick has recently completed the AGC/UW GC/CM training course.

| Project Names | Project Size | Project Type | Role During Project Phases | | |
|---|---|---|---|---|---|
| | | | Planning | Design | Construction |
| Ridgefield 5-8 Schools | $72.7M | GC/CM | CM | CM | CM |
| Ridgefield High School | $16.5M | GC/CM | CM | CM | CM |
| Jemtegaard Middle School | $37.8M | GC/CM | CM | CM | CM |
| Excelsior High School | $4.1M | GC/CM | CM | CM | CM |
| Evergreen High School Additions and Renovation | $37.8M | GC/CM | PM | PM | PM |
| Crestline Elementary School | $18.8M | GC/CM | CM | CM | CM |
| Toutle Lake Additions/Modernization | $10M | DBB | CM | CM | CM |
| 300 Oregon School Projects | $900M | CM/GC | CM | CM | CM |

**Adam Cormack**, Partner, Construction Manager. Adam brings extensive CM/GC experience to the project team. Successful completion of educational and commercial projects valued at up to $40 million dollars. Supplied both Oversight and Project Management on over 100 educational projects. Prepared program and project budgets and schedules, contracting strategies, and project control documents. Adam has recently completed the AGC/UW GC/CM training course.

| Project Names | Project Size | Project Type | Role During Project Phases | | |
|---|---|---|---|---|---|
| | | | Planning | Design | Construction |
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| Jemtegaard Middle School | $37.8M | GC/CM | CM | CM | CM |
| Excelsior High School | $4.1M | GC/CM | CM | CM | CM |
| Crestline Elementary School | $18.8M | GC/CM | CM | CM | CM |
| Toutle Lake Additions/Modernization | $10M | DBB | CM | CM | CM |
| 100 Oregon School Projects | $500M | CM/GC | CM | CM | CM |

**Scott Rose**, Senior Project Manager. Scott is an effective and knowledgeable construction manager with 30 years of industry experience in commercial and educational construction. Over 300 completed projects, including 250 schools. Roughly 40% of these projects were GC/CM, as well as a number of State correctional projects, including one of the largest in the State of Oregon. He served as principal in an international school planning and design firm. Scott is skilled at listening to client needs and integrating them into the schedule, budget, and quality parameters of the project. He emphasizes aligning scope and product with the budget and desired program outcomes and functionality. Scott aspires toward exceeding client expectations.

| Project Names | Project Size | Project Type | Role During Project Phases | | |
|---|---|---|---|---|---|
| | | | Planning | Design | Construction |
| Ridgefield 5-8 Schools | $72.7M | GC/CM | CM | CM | CM |
| Ridgefield High School | $16.5M | GC/CM | CM | CM | CM |
| Tahoma High School | $154M | GC/CM | AR | AR | AR |
| 250 Oregon School Projects | $750M | GC/CM | AR | AR | AR |

**Tracie Peterson**, Cost Control/Accounting Specialist. Tracie's previous experience working as a school district's Business Manager and AP/AR/Payroll Clerk, as well as her two years of experience working on site as a project engineer, makes her a uniquely qualified asset. Tracie holds a BS in Accounting, giving her additional insight that allows her to communicate the budget status at any given moment.

**Liz Johnson**, Senior Administrative Assistant. Liz is an experienced project coordinator with over eight years of experience managing schedules, budgets, and contracts to meet client budget and schedule expectations. She is focused on superior communication skills in community and business efforts.

## Perkins Coie LLP

**Graehm Wallace**, a partner with the firm's litigation practice, has 20 years of experience working in all areas of construction transactions, counseling and litigation. He and his group advise scores of school districts and other public entities on transactional, procurement, administrative and dispute resolution issues. They create and negotiate billions of dollars of construction contacts each year, including dozens of public and private GC/CM and design-build contracts.

## Parametrix

**Howard Hillinger** is the GC/CM Program Advisor and has over 30 years of project management and construction management experience. He is a Principal Consultant with Parametrix for Project and Construction Management Services, where he has supported owners on several projects utilizing alternative project delivery. He is GC/CM advisor who has supported two historic school modernizations for Tacoma Public Schools and Colman Dock/Seattle Multimodal Terminal for Washington State Ferries. He is a PRC member, served as a member of GC/CM Heavy Civil task force, and has completed AGC/UW GC/CM class. Howard is a Certified Construction Manager.

| Project Names | Project Size | Project Type | Role During Project Phases | | |
|---|---|---|---|---|---|
| | | | Planning | Design | Construction |
| Ridgefield 5-8 Schools | $72.7M | GC/CM | GC/CM Advisor | GC/CM Advisor | GC/CM Advisor |
| Jemtegaard Middle School | $37.8M | GC/CM | GC/CM Advisor | GC/CM Advisor | GC/CM Advisor |
| Excelsior High School | $4.1M | GC/CM | GC/CM Advisor | GC/CM Advisor | GC/CM Advisor |
| McCarver Elementary School | $39M | GC/CM | GC/CM Advisor | GC/CM Advisor | GC/CM Advisor |
| Stewart Middle School | $66M | GC/CM | GC/CM Advisor | GC/CM Advisor | GC/CM Advisor |

## LSW Architects, PC

LSW Architects has a strong background in GC/CM projects in Washington and Oregon. This history includes the Ridgefield GC/CM 2012 and 2016 Capital Bond Programs, the Washougal GC/CM 2014 Capital Bond Program, and a GC/CM high school and elementary school for Evergreen Public Schools. In addition, LSW has successfully completed Oregon CM/GC projects for the Centennial, Beaverton, Sherwood, and Neah-Kah-Nie school districts.

**Casey Wyckoff**, Principal, LSW Architects, PC. Casey has over 20 years of experience practicing educational architecture. He has designed and managed numerous early learning, K-12, and community college projects throughout Washington and Oregon. Casey provides overall design leadership for the firm and will be hands-on in the development of the projects for EPS. Casey has worked on many GC/CM projects which include, but are not limited to, Washougal School District Jemtegaard Middle School, Washougal School District Excelsior High School, Evergreen Public Schools Crestline Elementary School, and the Evergreen High School addition and renovation.

| Project Names | Project Size | Project Type | Role During Project Phases | | |
|---|---|---|---|---|---|
| | | | Planning | Design | Construction |
| Ridgefield High School Additions | $18.5M | GC/CM | PIC DES | PIC DES | PIC DES |
| Union Ridge ES Addition | $10.5M | GC/CM | PIC DES | PIC DES | PIC DES |
| South Ridge ES Addition | $6.6M | GC/CM | PIC DES | PIC DES | PIC DES |
| Crestline Elementary Replacement | $1.1M | GC/CM | PIC DES | PIC DES | PIC DES |

| | | | | | |
|---|---|---|---|---|---|
| Ridgefield 5-8 Schools | $72.7M | GC/CM | PIC<br>DES | PIC<br>DES | PIC<br>DES |
| Evergreen High School Additions and Renovation | $37.8M | GC/CM | DES | DES | DES |
| Beaverton School District Addition | $2.1M | CM/GC | DES | DES | DES |

**Jason Olson**, Project Architect with LSW Architects, PC. Jason has 20 years of experience in the design and construction industry, almost all of which has been public works/educational facilities. Jason was the job-captain on the Evergreen High School Addition and Renovation GC/CM projects for Evergreen Public Schools (completed in 2007, 276,400sf, cost of construction $37,800,500). Jason will be the Project Architect for this EPS project.

| Project Names | Project Size | Project Type | Role During Project Phases | | |
|---|---|---|---|---|---|
| | | | Planning | Design | Construction |
| Jemtegaard Middle School | $37.8M | GC/CM | PA<br>DES | PA<br>DES | PA<br>DES |
| Crestline Elementary Replacement | $1.1M | GC/CM | PA<br>DES | PA<br>DES | PA<br>DES |
| Ridgefield 5-8 Schools | $72.7M | GC/CM | PA<br>DES | PA<br>DES | PA<br>DES |
| Evergreen High School Additions and Renovations | $37.8M | GC/CM | PA<br>DES | PA<br>DES | PA<br>DES |
| Clark College Gaiser Hall Addition | $11M | DBB | PA<br>DES | PA<br>DES | PA<br>DES |
| Spokane Community College Tech-Ed Building | $10M | DBB | PA<br>DES | PA<br>DES | PA<br>DES |
| Evergreen Health & Bio Science High School | $6M | DBB | PA<br>DES | PA<br>DES | PA<br>DES |

**Karen Knauss**, Project Architect with LSW Architects, PC. Karen has over 15 years of experience with new construction and renovations for public and private projects, including adaptive-reuse, seismic upgrades, and other modernizations. She demonstrates the strategic thinking and creativity necessary to effectively address changes and solve unexpected issues that occur during design and construction. Karen is passionate about the role of spaces and places in support of effective teaching and learning. She is a gifted collaborator, able to effectively communicate with a diverse cross-section of project stakeholders.

| Project Names | Project Size | Project Type | Role During Project Phases | | |
|---|---|---|---|---|---|
| | | | Planning | Design | Construction |
| Excelsior High School | $4.1M | GC/CM | PA<br>DES | PA<br>DES | PA<br>DES |
| Peter S. Ogden Elementary School | $29M | DBB | PA<br>DES | PA<br>DES | None |

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

Construction experience for each proposed staff member and consultant is described in the Staff and Consultant Biographies above.

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

EPS has and will continue to adequately manage the project by surrounding itself with professionals that have a proven track record of successful GC/CM projects. The firms of LSW Architects, R&C Management, and Parametrix are proven products. EPS expects these three firms, coupled with Graehm Wallace of Perkins Coie LLP, will guide our projects to a successful and timely completion. A Roles and Responsibilities Matrix has been developed to better illustrate the relationship of the firms and their role in the GC/CM process. The matrix is located in the exhibits section.

EPS will set in place specific controls to manage the project, beginning with a management plan developed by R&C and reviewed and approved by EPS. R&C will work closely with LSW and EPS to establish procedures and limits of authority with regards to budget, schedule, and change in the work approvals. This plan will provide a responsibility matrix and will address specific expectations for EPS, the design team, and the project management teams. These expectations will be consolidated into a Program Management Plan. Subsequent expectations of the GC/CM team will be identified in the RFP, RFFP, and GC/CM agreement.

Project budgets, schedules, MACCs, and TCC will be established early on and reviewed at each design phase by the Superintendent and School Board. The project management team will coordinate with the school Superintendent and Chief Operations Officer to ascertain that all parties are aware of any development that might affect the budget and that all expenditures are approved prior to payment. Expenditure limits on a per-occurrence basis will be established by the Superintendent and the Board and a line of signature authority will be implemented.

EPS anticipates that the project will be bid in phases to maintain better control of design, schedule, and costs. This expectation will most likely drive mini MACCs cost development by the GC/CM team in an effort to better control the process and identify design, schedule, or budget shortfalls. Contingencies will include statute-driven contingencies and conservative owner contingencies to provide cushion beyond those figures established in the GC/CM contract and OSPI recommendations. EPS will insist that each project reconcile budget, design, and schedules prior to moving forward with the next design phase. If budget shortfalls are identified, the entire team will cooperate to make whatever changes are necessary to bring the project back within budget.

As part of the preconstruction services, the GC/CM will develop a subcontracting bid plan and schedule for bidding, as well as for phased construction and early procurement. The

Architect's design deliverables will be integrated with the GC/CM bidding and construction plan. Early and frequent meetings with the City permit agencies, fire department, and other code officials prior to permit intakes will help ensure that permit comment requirements that may affect the MACC will be mitigated.

Once under construction, work will be documented daily by the project management team and weekly meetings with be held to facilitate progress of the work. The GC/CM team will be expected to provide buyout updates on a biweekly basis and full budget overviews monthly. It is anticipated that EPS will allow the Superintendent to have Board level authority to approve budget expenditures at established limits, but within contingency allotments.

As would be expected, procurement and legal matters will be routed through Graehm Wallace for review.

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

Our procurement process will build upon our previous experience with GC/CM project delivery. It will also take into account the short (six week) duration we have scheduled for the process by issuing Draft Documents to the GC/CM Contracting community, prior to PRC approval of the GC/CM process, via EPS's website and personal contact with those firms. Comments will be received and incorporated into the final documents. The goal is to alert firms to our projects and give them additional time to prepare for when the final documents will be issued. Our process will include the following:

- Early release of the Draft Documents (RFP, RFFP, and General Conditions and Agreement)
- Marketing of the project to experienced potential GC/CM candidates
- Soliciting and ranking responses to the RFP
- Interviewing shortlisted GC/CM candidates
- Soliciting pricing proposals (RFFP) from the highest ranked firms
- Recommending award to the highest ranked firms
- Solicit legal review of the process

We anticipate the process will be scheduled as noted in Question #3, which will allow the GC/CM to join the team at 90% Schematic Design.

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

Perkins Coie, in collaboration with R&C Management Group and Parametrix, is currently developing the GC/CM Agreement and General Conditions. The contract documents will be based on existing documents utilized on previous projects, which are modified AIA 201 and AIA 133, supplemented with best practices language from other agencies such as UW.

## 7. PUBLIC BODY (EVERGREEN PUBLIC SCHOOLS) 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:**

| Project Names | Project Description | Contracting Method | Planned Start | Planned Finish | Actual Start | Actual Finish | Planned Budget | Actual Budget | Reason for Budget Overrun |
|---|---|---|---|---|---|---|---|---|---|
| Cascadia Tech Academy | Two additions to the Cascadia Tech Academy | DBB | 9/1/13 | 7/1/14 | 9/1/13 | 6/15/14 | $7.8M | $7.3M | Scope Decrease |
| Crestline Elementary (Temporary School) | 60,000sf elementary school built within a large warehouse. Used to house students for one year while a new elementary school was constructed. | GC/CM (modified due to emergency build due to fire) | 5/1/13 | 8/15/13 | 5/1/13 | 8/15/13 | $1.2M | $1.1M | Scope Decrease |
| Crestline Elementary | New 62,000sf elementary school | GC/CM | 7/30/13 | 8/5/14 | 7/30/13 | 8/15/14 | $18.7M | $18.8M | Scope Increase |
| Capital Renewal Projects | Annual summer District-wide maintenance projects | DBB | Mid-June | End of August | Mid-June | End of August | $5-$7M | $5-$7M | N/A |
| HeLa High School | New 67,000sf high school | DBB | 10/6/11 | 12/15/12 | 10/6/11 | 1/15/13 | $18.3M | $18.3M | N/A |

## 8. PRELIMINARY CONCEPTS, SKETCHES, OR PLANS DEPICTING THE PROJECT

Index of Exhibits:

Exhibit 1: Existing Conditions

Exhibit 2: Proposed Development

Exhibit 3: Construction Plan

Exhibit 4: Roles and Responsibilities Matrix

## 9. RESOLUTION OF AUDIT FINDINGS ON PREVIOUS PUBLIC WORKS PROJECTS

Evergreen Public Schools has not received audit findings on any public works projects.

## SIGNATURE OF AUTHORIZED REPRESENTATIVE

In submitting this application, you, as the authorized representative of your organization, understand that: (1) the PRC may request additional information about your organization, its construction history, and the proposed project; and (2) your organization is required to submit the information requested by the PRC. You agree to submit this information in a timely manner and understand that failure to do so shall render your application incomplete.

Should the PRC approve your request to use the GC/CM contracting procedure, you also understand that: (1) your organization is required to participate in brief, state-sponsored surveys at the beginning and the end of your approved project; and (2) the data collected in these surveys will be used in a study by the state to evaluate the effectiveness of the GC/CM process. You also agree that your organization will complete these surveys within the time required by CPARB.

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

Signature: 

Name *(please print)*: Susan Steinbrenner

Title: Executive Director of Facilities

Date: 4/20/18

NE 137TH AVE

NE 72ND AVE

NE 137TH AVE

NE 71ST AVE

## KEYNOTES:

1. Classroom Pods
2. Main Building Classrooms
3. Office and Gymnasium
4. Portables
5. Sports Fields
6. Play Fields
7. Jogging Trail
8. Property Line
9. Vehicular Circulation
10. Visitor and Staff Parking
11. Student Garden
12. Playground
13. Covered Play Structure
14. Bus Drop-off
15. Main Building Entrance

# SIFTON ELEMENTARY SCHOOL

**EVERGREEN PUBLIC SCHOOLS**

LSW ARCHITECTS

**Existing Conditions**

Exhibit
1


***KEYNOTES:***

**1** *Property Line*

**2** *Vehicle Circulation*

**3** *Fire Access*

**4** *Future School*

**5** *Sports Fields*

**6** *Staff / Private Parking*

**7** *Visitor Parking*

**8** *Bus Drop-off*

**9** *Water Retention*

**10** *Entry Plaza*

**11** *Future Portables*

**12** *Outdoor Learning / Student Garden*

**13** *Kindergarten Play*

**14** *Soft Surface Play*

**15** *Covered Play Structure*

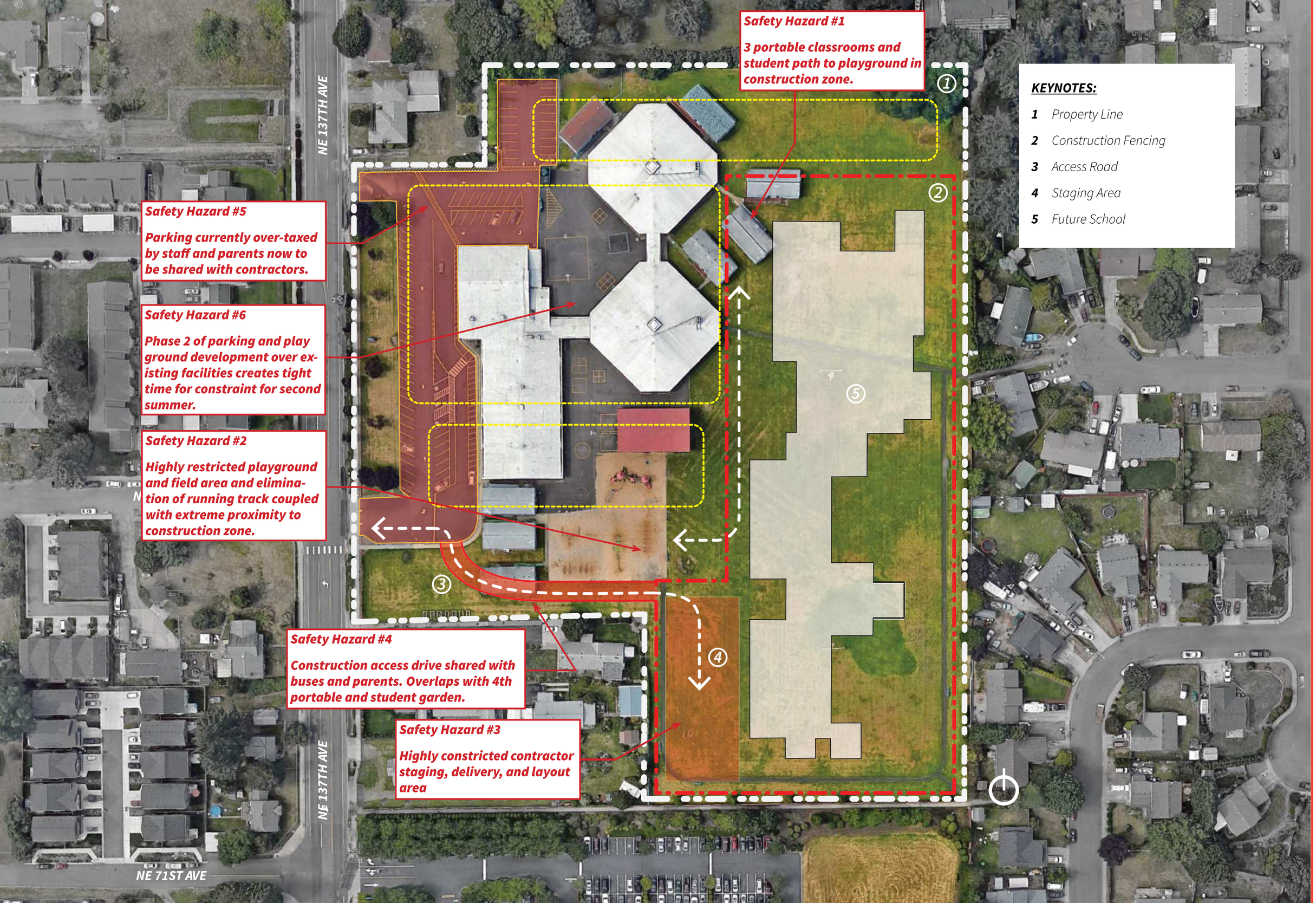
SIFTON ELEMENTARY SCHOOL

**EVERGREEN PUBLIC SCHOOLS**

LSW ARCHITECTS

**Proposed Development**

Exhibit
2




# SIFTON ELEMENTARY SCHOOL

**EVERGREEN PUBLIC SCHOOLS**

LSW ARCHITECTS

## Proposed Construction Plan

Exhibit 3

GC/CM Roles and Responsibilities

**EXHIBIT 4**

| GC/CM SERVICES: | Owner | PM/CM | Advisor | A/E | Legal |
|---|---|---|---|---|---|
| **Project Review Committee submittal & presentation** | Input | Primary | Primary | Input | |
| **Draft GC/CM contract (agreements, general conditions)** | Approve | Primary | Primary | Input | Primary |
| **GC/CM Request for Qualifications/Proposal Development** | Approve | Primary | Primary | Input | |
| **GC/CM Selection Process - Evaluation Procedures** | Review, Approve | Review, Input | Primary | Input | Input |
| **GC/CM Selection process Phase 1 (RFQ/P)** | Primary | Primary | Primary | Participate | Input |
| **GC/CM Selection process Phase 2 (Interviews)** | Participate, | Primary | Primary | Participate, Concur | |
| **GC/CM Selection process Phase 3 (Request For Final Proposals)** | Review, Approve | Primary | Primary | Input | Review, Input |
| **Pre – Final Proposal Meeting and Addenda** | Approve | Primary | Primary | Concur | |
| **Final proposals for Fee and Specified General Conditions:** | Approve | Primary | Primary | Informed | Informed |
| **Preconstruction Work Plan** | Approve | Primary | Primary | Informed | Review |
| **Consultation during Preconstruction:** | Approve | Primary | Input | Concur | Informed |
| **Mechanical and Electrical Subcontractor Selection (if elect EC/CM and/or MC/CM):** | Approve | Primary | Primary | Informed | As needed |
| **Subcontract Plan** | Approve | Primary | Primary | Concur | As needed |
| **Subcontract Buyout:** | Approve | Primary | Primary | Concur | As needed |
| **MACC Negotiations and GC/CM Contract Preparation:** | Approve | Primary | Primary | Concur | As needed |

**Legend**

- Primary responsibility, author and time commitment
- Supporting responsibility, author and time commitment
- Input, review and/or approve
- Informed, input as needed