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SUMNER-BONNEY LAKE BUILDS

Reference Document: Project Review Committee (PRC) and Sumner Bonney Lake School District (SBLSD) GC/CM Applications

Date: September 25-26, 2025 (Upcoming PRC Meeting)
Subject: Review of Sumner Bonney Lake School District (SBLSD) General Contractor/Construction Manager (GC/CM) Applications for Bonney Lake High School Renovations & Expansion and Sumner High School Phase 2.
Sources:

- "Project Review Committee (PRC) | Department of Enterprise Services (DES)" (DES Website)
- "Sumner Bonney Lake School District - Bonney Lake High School - GC/CM Application" (BLHS Application)
- "Sumner Bonney Lake School District - Sumner High School Phase 2 - GC/CM Application" (SHS Application)

I. Executive Summary

The Project Review Committee (PRC), mandated by RCW 39.10.220, is scheduled to review two General Contractor/Construction Manager (GC/CM) project applications from the Sumner Bonney Lake School District (SBLSD) on September 26, 2025. These projects are for the Bonney Lake High School Renovations & Expansion (estimated total cost: $76.4 million) and Sumner High School Phase 2 (estimated total cost: $113.0 million).

Both applications emphasize the need for the GC/CM alternative contracting procedure due to significant project complexities, including construction on active school campuses, complex phasing, limited site access, and the volatile market conditions affecting cost and supply chain. SBLSD has secured funding through a $732 million Capital Bond passed in November 2024 and has assembled an experienced project team with external advisors (OAC Services, Falcon & Fern Project Management, Perkins Coie LLP) to support these first-time GC/CM projects for the district. The district also outlines a robust plan for subcontractor outreach, particularly focusing on small-, minority-, women-, and veteran-owned businesses (SMWVB) participation.

OUR PROMISE: We will know, value, and support **every student**, helping them graduate ready to pursue a promising future.

II. Project Review Committee (PRC) Overview

The PRC is a Washington State Department of Enterprise Services (DES) committee responsible for "reviewing and approving public body certifications and project approval applications for the utilization of General Contractor/Construction Manager (GC/CM) and Design-Build (DB) delivery methods of public works construction." (DES Website)

Key Dates and Procedures:

- Upcoming Meetings: September 25 & 26, 2025 (application window was August 15-20), and December 4, 2025 (application window is October 15-20).
- Application Requirements: All applications must be on updated forms (dated March 27, 2025) by June 15, 2025. Applications are due between the 15th and 20th of the month prior to the scheduled meeting.
- Agenda Limit: "Only seven applications can be reviewed in a day and the agenda will be developed from the applications in the order they are received. If more than seven applications are received for one meeting date, then a second day of reviews will need to be scheduled." (DES Website)
- Appeals: Final PRC determinations can be appealed to the Capital Projects Advisory Review Board (CPARB) within seven days.
- Potential Violation Reporting: CPARB's Project Feedback Process Workgroup developed documents to assist in reporting potential violations of RCW 39.10, aiming to "help educate owners and the community on the appropriate and successful application of RCW 39.10's alternative delivery methods for the benefit of the community as a whole." (DES Website)

III. Bonney Lake High School (BLHS) Renovations & Expansion Project Application

A. Project Description:

- Applicant: Sumner Bonney Lake School District (SBLSD)
- Project Name: Bonney Lake High School Renovations & Expansion
- Location: Pierce County
- Scope: "This project will make much needed upgrades and expansion to the facility in the following ways: add additional classrooms; expand career & technical education

spaces; construct a welcome center, administration spaces, and student services; construct new spaces for baseball and softball with new turf field improvements; and, improve street access and intersections which have been needed for at least 10 years." Additional smaller projects include performing arts center improvements, replacement of existing plumbing, and parking/queueing improvements. (BLHS Application, Section 1c)

- Estimated Total Cost: $76.4 million (BLHS Application, Section 2A)
- Professional Services (A/E, Legal etc.): $6.00M
- Estimated Project Construction Costs (including construction contingencies): $47.0M
- Equipment and Furnishing Costs: $3.00M
- Off-site costs: $6.40M
- Contract Administration Costs (owner, CM etc.): $3.50M
- Contingencies (design & owner): $4.50M
- Sales Tax: $6.00M
- Funding Status: "$732 million Capital Bond passed in November 2024." (BLHS Application, Section 2B)

B. Rationale for GC/CM Contracting Procedure (Complexity and Public Benefit):

- Complexity: The project presents "significant scheduling, phasing, and coordination challenges" due to construction on an active high school campus, requiring "careful logistics planning, active coordination with the school, and revisions to traffic and pedestrian circulation." (BLHS Application, Section 4)
- Key complexities include:
    - Life/safety, environmental, and utility priorities: "Early identification and coordination of these elements will help the district manage and mitigate risks, reducing impacts to the educational experience during construction."
    - Limited site access and laydown areas: "The constrained site requires careful logistics planning, active coordination with the school, and revisions to traffic and pedestrian circulation."
    - Adjacent occupied middle school: "This increases the need for comprehensive safety planning, due diligence, and continuous coordination to protect both campuses."
    - Phased demolition and construction: Requiring temporary facilities, portable classrooms, and utility rerouting.

  - Stringent environmental and community considerations: "including dust, noise, and traffic control measures to meet the District's commitment to being a "good neighbor" to surrounding residences and the adjacent middle school." (BLHS Application, Section 4)
- Public Benefit (Fiscal and Risk Reduction): GC/CM "will benefit the public by increasing predictability and reducing financial risks." (BLHS Application, Section 5A)
  - Early contractor involvement allows for "real-time cost estimating, schedule validation, and risk assessment at every stage," reducing "the likelihood of budget overruns and delays."
  - Broader bid coverage and increased competition through established subcontractor relationships and targeted procurement strategies.
  - Value analysis and constructability reviews during design to identify "cost-saving opportunities, avoiding scope gaps, and optimizing building systems."
  - Prevents costly changes during construction through "clear, concise scopes of work and a safe, efficient phasing plan."
  - The combined benefits lead to "enhanced cost control, greater subcontractor engagement, improved constructability, and reduced risk" supporting project delivery "on budget, on schedule, and with the highest value for taxpayers." (BLHS Application, Section 5A)
  - Traditional Method Inapplicability: "Selecting a contractor under the traditional Design-Bid-Build method is not optimal for this project." This method introduces significant risks such as "potential cost overruns due to lack of real-time cost estimating during design," "schedule delays caused by unforeseen constructability issues," and "challenges managing complex MEP systems." (BLHS Application, Section 5B)

C. Public Body Qualifications and Management Controls:

- Project Team: SBLSD has hired Matt Guilanians of Falcon & Fern Project Management as Program Manager and OAC Services as GC/CM advisor. (BLHS Application, Section 3c)
- Marina Tanay (Director of Capital Projects): Over a decade of experience in K-12 school construction, managing projects totaling over $195 million.
- John Boatman (Capital Projects/Facilities Manager): Over 33 years of experience in school design, planning, construction, and operations, with over 60 new school builds and 300+ modernizations ($4.2B in projects).

- Matt Guilanians (Program Manager): Over 25 years of experience in complex educational projects, managing billions of dollars in K-12 capital programs.
- Jeff Jurgensen (OAC Services, Principal in Charge / GC/CM Advisor): Over 30 years of construction experience, worked on 15+ major capital GC/CM projects and six major design-build projects.
- Phil Iverson (Sr. Project Manager): Over 20 years of experience in Facilities and Program/Project Management for school district capital projects, including K-12 GC/CM projects.
- Wade Smith (Project Executive): Over two decades of experience leading K-12 capital construction projects, including two comprehensive GC/CM projects exceeding $110 million. Holds a doctorate in education with a dissertation on K-12 capital construction alternative delivery.
- Andrew Greene (Construction Counsel, Perkins Coie LLP): Partner in Seattle office, served as project counsel for numerous school districts and public owners, recognized in "The Best Lawyers in America" for construction law. (BLHS Application, Section 6)
- Management Controls:Regular coordination meetings between SBLSD, Falcon & Fern, and OAC.
- Principals-In-Charge meetings for senior leadership decision-making.
- Clearly defined roles and responsibilities.
- Board oversight for scope and budget changes, supported by OSPI D-Forms.
- Delegated authority to the Superintendent and leadership team.
- Bond oversight committee for annual reports and major project review.
- Marina Tanay to retain operational control and decision-making authority. (BLHS Application, Section 7)
- Budget/Cost Control: Aligned project budgets, work breakdown structure, and defined budget reporting requirements. Cost estimates reconciled at each design phase. OSPI School Facilities value-added measures (VAMs) and constructability reviews. SBLSD Board approval at each phase. (BLHS Application, Section 8)
- Schedule: Monthly updates of master milestone schedules during preconstruction, design, subcontractor buyout, and construction phases. (BLHS Application, Section 8)

D. Owner Readiness:

- SBLSD engaged with other public owners (Bellingham, Quincy, Central Valley, Mead School Districts) to understand GC/CM process pros and cons.
- Hired experienced GC/CM manager, John Boatman.

- Arranged in-house AGC training for the district.
- Completed project delivery workshops with designers and contractors.
- OAC is leading the first 3 GC/CM projects and will document processes to allow SBLSD to manage future GC/CM projects internally.
- Project management team read GC/CM Best Practices manual and Progressive Design Build best practices.
- Proactive approach to reviewing bid packages to ensure they "are developed in the best interest of SBLSD and our community" and maximize "opportunity for local contractors and vendors to participate." (BLHS Application, Section 10)

E. Subcontractor Outreach:

- SBLSD is committed to "diversity, equity, and inclusion values" and will implement "intentional, proactive strategies to encourage participation from small-, minority-, women-, and veteran-owned businesses (SMWVB)." (BLHS Application, Section 12G)
- Owner-Led Outreach: Informational meetings, marketing through OMWBE directory, certified firm lists, local/regional chambers of commerce, minority/women business advocacy organizations, and local plan centers.
- GC/CM Selection Criteria: SMWVB inclusion is a scored element in the procurement process. Prospective GC/CM firms must describe their approach to SMWVB participation, provide examples of past performance, and outline mentoring/assistance strategies.
- GC/CM Outreach, Inclusion, and Procurement Plan: Selected GC/CM will develop a project-specific plan, including:
- Setting specific participation targets for SMWVB firms.
- Identifying targeted bid packages and procurement strategies.
- Scheduling "Meet the GC/CM" events.
- Including mentorship and technical assistance programs. (BLHS Application, Section 12G)

IV. Sumner High School (SHS) Phase 2 Project Application

A. Project Description:

- Applicant: Sumner Bonney Lake School District (SBLSD)
- Project Name: Sumner High School Phase 2
- Location: Pierce County

- Scope: "This project consists of constructing a new, approximately 103,000 sq. ft., three-story building directly adjacent to and connecting with the existing Sumner High School. The new facility will house approximately 50 classrooms and a range of specialized program spaces, including animal science labs with an adjacent greenhouse, aerospace manufacturing, CAD and digital design classrooms, robotics, early learning and infant childcare facilities, and culinary arts kitchen. This addition will significantly expand academic, career, and technical education opportunities, while improving campus functionality and supporting projected enrollment growth." (SHS Application, Section 1c)
- Estimated Total Cost: $113.0 million (SHS Application, Section 2A)
- Professional Services (A/E, Legal etc.): $11.00M
- Estimated Project Construction Costs (including construction contingencies): $72.0M
- Equipment and Furnishing Costs: $6.00M
- Off-site costs: $1.00M
- Contract Administration Costs (owner, CM etc.): $5.50M
- Contingencies (design & owner): $8.50M
- Sales Tax: $9.00M
- Funding Status: "$732 million Capital Bond passed in November 2024." (SHS Application, Section 2B)

B. Rationale for GC/CM Contracting Procedure (Complexity and Public Benefit):

- Complexity: The SHS Phase 2 project also presents "significant scheduling, phasing, and coordination challenges" for a 103,000 sq. ft., three-story addition "built just feet away from and directly connected to the existing fully operational high school." (SHS Application, Section 4)
- Key complexities include:
    - Life/safety, environmental, and utility priorities: "Early identification and coordination are essential to protect the school community, particularly as construction ties into existing utilities and building systems."
    - Extremely limited site access and laydown areas: "The tight campus footprint will require detailed logistics planning, constant coordination with school operations, and potential adjustments to traffic and pedestrian circulation."
    - Direct adjacency to the existing academic building: "This proximity increases the need for robust safety protocols, noise and dust mitigation, and active monitoring to avoid disruptions to ongoing instruction and activities."

- Integration of specialized program spaces: Advanced CTE facilities (animal science labs, aerospace manufacturing, CAD/digital design classrooms, early learning/infant childcare facilities, culinary arts kitchen) require careful sequencing and specialized coordination. (SHS Application, Section 4)
- Public Benefit (Fiscal and Risk Reduction): Similar to the BLHS project, GC/CM "will benefit the public by increasing predictability and reducing financial risks." (SHS Application, Section 5A)
- Early contractor involvement provides "real-time cost estimating, schedule validation, and risk assessment," crucial for "Sumner High School Phase 2" to "significantly improve cost and schedule predictability, reducing the likelihood of budget overruns, delays, and operational disruptions."
- Broader bid coverage and increased competition are expected.
- Value analysis and constructability reviews during design to identify "cost-saving opportunities, avoiding scope gaps, and optimizing building systems."
- GC/CM helps "prevent costly changes during construction" and minimizes disruption through "clear, concise scopes of work and a safe, efficient phasing plan." (SHS Application, Section 5A)
- Traditional Method Inapplicability: "Selecting a contractor under the traditional Design-Bid-Build method is not optimal for the Sumner High School Phase 2 project." Risks include "potential cost overruns," "schedule delays," and "managing complex MEP technology, and security system tie ins without early coordination." (SHS Application, Section 5B)

C. Public Body Qualifications and Management Controls:

- Project Team: Identical to the BLHS project, SBLSD has hired Matt Guilanians of Falcon & Fern Project Management as Program Manager and OAC Services as GC/CM advisor. (SHS Application, Section 3c) The same experienced team members (Marina Tanay, John Boatman, Matt Guilanians, Jeff Jurgensen, Phil Iverson, Wade Smith, and Andrew Greene) are listed with their extensive qualifications. (SHS Application, Section 6)
- Management Controls: The same robust management controls are in place for the SHS project, including regular coordination meetings, Principals-In-Charge meetings, defined roles, Board oversight, delegated authority, and an independent bond oversight committee. (SHS Application, Section 7)
- Budget/Cost Control: Aligned project budgets, work breakdown structure, and defined budget reporting. Cost estimates reconciled at each design phase with OSPI School

Facilities VAMs and constructability reviews. SBLSD Board approval at each stage. (SHS Application, Section 8)
- Schedule: Monthly updates of master milestone schedules during preconstruction, design, subcontractor buyout, and construction phases. (SHS Application, Section 8)

D. Owner Readiness:
- SBLSD engaged with other public owners (Bellingham, Quincy, Central Valley, Mead School Districts) to understand GC/CM process.
- Hired experienced GC/CM manager, John Boatman.
- Arranged in-house AGC training.
- Completed project delivery workshops.
- OAC is leading the first 3 GC/CM projects and will document processes for future internal management.
- Project management team read GC/CM Best Practices manual.
- Proactive approach to reviewing bid packages to "maximize the opportunity for local contractors and vendors to participate." (SHS Application, Section 10)

E. Subcontractor Outreach:
- SBLSD is committed to "diversity, equity, and inclusion values" and will implement "intentional, proactive strategies to encourage participation from small-, minority-, women-, and veteran-owned businesses (SMWVB)." (SHS Application, Section 12G)
- Owner-Led Outreach: Informational meetings, marketing through OMWBE directory, certified firm lists, local/regional chambers of commerce, minority/women business advocacy organizations, and local plan centers.
- GC/CM Selection Criteria: SMWVB inclusion is a scored element in the procurement process. Prospective GC/CM firms must describe their approach to SMWVB participation, provide examples of past performance, and outline mentoring/assistance strategies.
- GC/CM Outreach, Inclusion, and Procurement Plan: Selected GC/CM will develop a project-specific plan, including:
- Setting specific participation targets for SMWVB firms.
- Identifying targeted bid packages and procurement strategies.
- Scheduling "Meet the GC/CM" events.
- Including mentorship and technical assistance programs. (SHS Application, Section 12G)

V. Main Themes and Important Ideas/Facts Across Sources

- PRC's Mandate and Authority: The PRC is statutorily mandated by RCW 39.10.220 to review and approve alternative public works construction delivery methods (GC/CM and Design-Build). This underscores the regulatory framework governing these projects.
- Increased Predictability and Reduced Risk as Key Drivers for GC/CM: Both SBLSD applications explicitly state that the GC/CM method is chosen to "benefit the public by increasing predictability and reducing financial risks." This is achieved through early contractor involvement, real-time cost estimating, schedule validation, and risk assessment at every stage, contrasting with the inherent risks of the traditional Design-Bid-Build method for complex projects.
- Complexities of Construction on Active Campuses: A central theme in both SBLSD applications is the significant challenges posed by building on "active, fully occupied high school campuses." This necessitates intricate phasing strategies, strict safety protocols, continuous coordination with school staff, and mitigation of impacts to the educational environment.
- Volatile Market Conditions and Cost Control: Both projects are described as "sizable, multi-year bond programs with significant exposure to cost escalation, market volatility, and supply chain uncertainty." The GC/CM method is presented as instrumental in providing "ongoing, real-time cost modeling and escalation forecasting" to keep projects on budget.
- Robust Project Management and Expertise: SBLSD has proactively addressed its first-time use of GC/CM by assembling a highly experienced team, including internal staff (Marina Tanay, John Boatman) and external consultants (Falcon & Fern, OAC Services, Perkins Coie LLP). The detailed biographies highlight extensive experience in K-12 capital projects and alternative delivery methods.
- Commitment to Small, Minority, Women, and Veteran-Owned Businesses (SMWVB) Inclusion: SBLSD explicitly commits to "intentional, proactive strategies to encourage participation from small-, minority-, women-, and veteran-owned businesses (SMWVB)," in alignment with RCW 39.19. This is integrated into GC/CM selection criteria, with a plan for dedicated outreach and targeted bid packaging.

- Comprehensive Oversight and Controls: SBLSD details multiple layers of control, including regular coordination meetings, senior leadership involvement, Board oversight, and an independent bond oversight committee. This demonstrates a structured approach to project governance and accountability.
- Learning and Development for Owner Readiness: SBLSD's engagement with other districts that successfully used GC/CM, hiring experienced personnel (John Boatman), internal AGC training, and leveraging OAC to build internal capacity for future GC/CM projects, highlights a strong commitment to "Owner Readiness."
- Funding Secured: Both projects are backed by a "$732 million Capital Bond passed in November 2024," ensuring the financial viability of these significant undertakings.