



JANUARY 2026 BOND OVERSIGHT COMMITTEE MEETING



AGENDA

- Welcome and Introductions
- 2024 Bond Projects – General Information
- 2024 Bond Projects – Project-by-Project Update
- Committee Business
- What's Ahead
- Wrap Up
- Adjourn

WELCOME

- Opening Remarks
- Introductions
- What are you hearing about the bond projects?

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2024 Bond Projects General Information

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2024 Bond Projects – General Information

- Overall 2024 Bond Projects Budget

2024 Bond Projects - Schedules and Cash Flow

Bond Sales		\$175m	\$150m	\$275m	\$132m					\$732m
Projects	Budget	2024/2025	2025/2026	2026/2027	2027/2028	2028/2029	2029/2030	2030/2031	2031/2032	Totals
BLHS Classroom Addition & Intersection	\$76.9m	\$2.0m	\$6.0m	\$40.0m	\$28.9m					\$76.9m
Sumner HS Phase 2 West Building	\$114.0m	\$2.0m	\$6.0m	\$40.0m	\$40.0m	\$26.0m				\$114.0m
New Middle School at Tehaleh	\$200.0m	\$2.0m	\$6.0m	\$20.0m	\$88.0m	\$84.0m				\$200.0m
Liberty Ridge Elementary Improvements	\$2.9m		\$0.8m	\$1.4m	\$0.6m					\$2.9m
Crestwood Elementary Improvements	\$2.9m		\$0.8m	\$1.4m	\$0.6m					\$2.9m
Tehaleh Heights Elementary Expansion	\$19.0m		\$1.0m	\$3.0m	\$15.0m					\$19.0m
Donald Eismann Ele. Queueing, Parking & Field	\$7.8m		\$1.0m	\$6.8m						\$7.8m
Daffodil Valley Ele. Field Improvements	\$6.0m			\$6.0m						\$6.0m
Sumner HS (Master Plan Build Out)	\$298.2m				\$2.0m	\$54.0m	\$116.2m	\$92.0m	\$34.0m	\$298.2m
Energy Efficiency Improvements*	\$4.0m	\$0.3m	\$0.8m	\$1.0m	\$0.5m	\$1.0m	\$0.5m			\$4.0m
Totals		\$6.3m	\$22.4m	\$119.7m	\$175.7m	\$165.0m	\$116.8m	\$92.0m	\$34.0m	\$731.8m
Ending Balance		\$168.8m	\$146.4m	\$26.7m	\$1.0m	\$111.0m	\$126.2m	\$34.2m	\$0.2m	
Actual Totals		\$4.2m								
Actual Ending Balance		\$170.8m								

2024 Bond Projects – Risks & Opportunities

- Risks**
 - Economy, including tariffs and inflation
 - Permit process timing
- Opportunities**
 - Early bid packages
 - Outreach to local, small and women/minority owned businesses

2024 BOND PROJECT UPDATES

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Bonney Lake HS Expansion

PROJECT TEAM

Architect: BCRA, Inc.

GC/CM Contractor: Korsmo Construction

Structural Engineer: PCS Structural Solutions

Mechanical/Electrical Engineer: GFT

Civil Engineer: Sitts & Hill Engineers

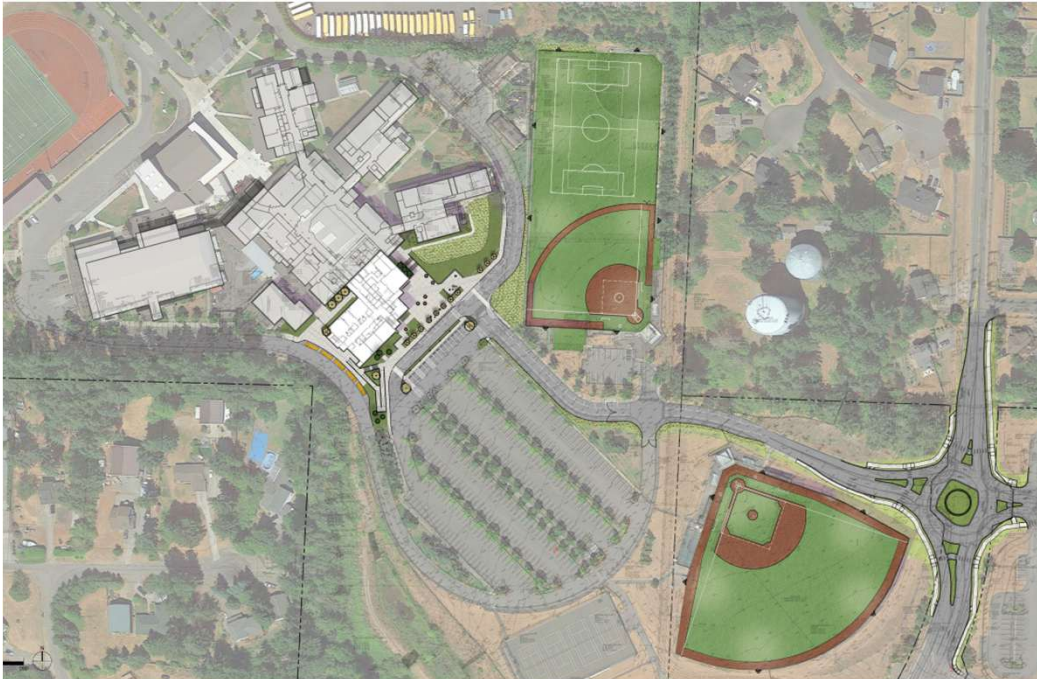
Landscape Architect: Fora Landscape Architects

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Bonney Lake HS Expansion

- Schematic Design (SD) and Value Engineering presented to School Board on January 20.
- Exterior and interior material and color palettes finalized.
- Design Development Phase underway.

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Exterior Materials - Options

ARCHITECTURE



OPTION 1 FROM MAIN ENTRY



OPTION 2 FROM MAIN ENTRY

Exterior EGD

OPTION 1



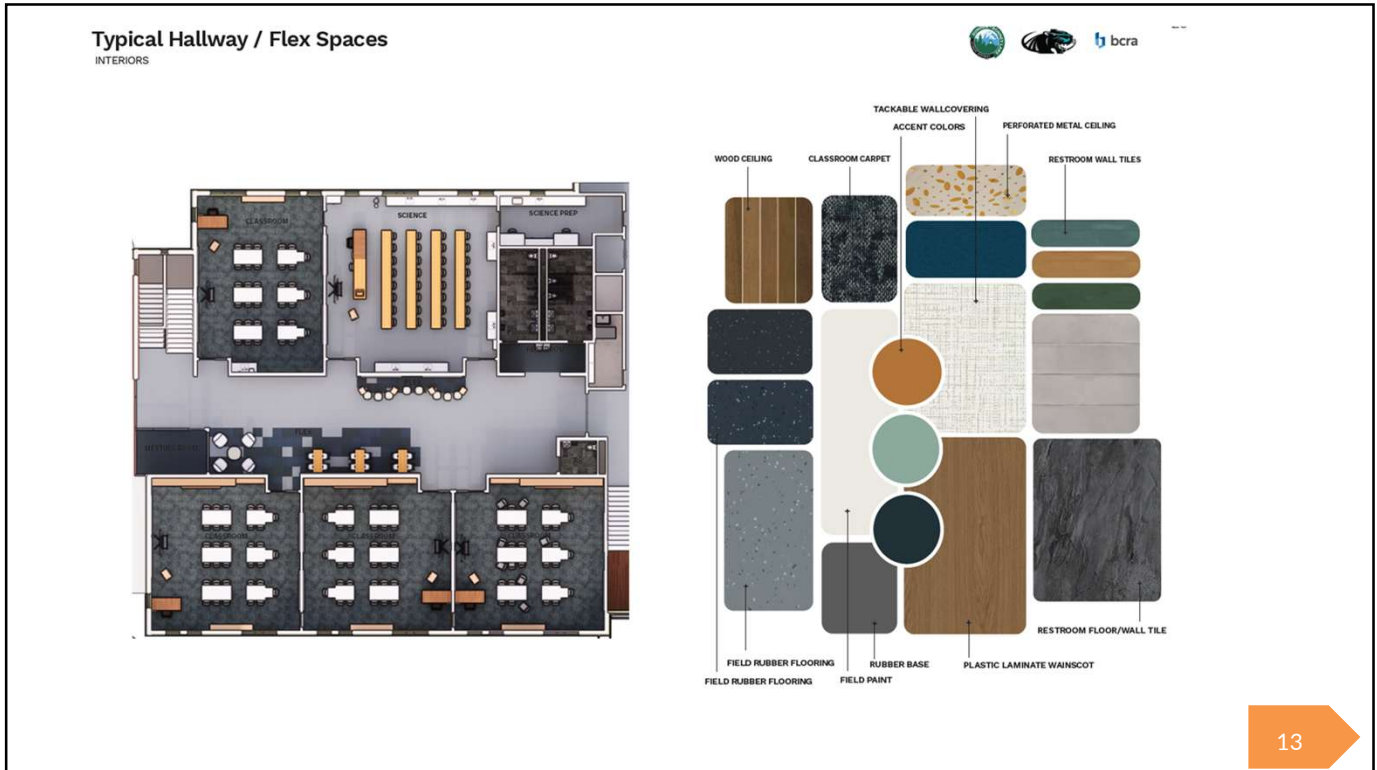
ILLUMINATED RECESSED LETTERING



WINDOW GRAPHICS



WELCOME CENTER



Bonney Lake HS Intersection

PROJECT TEAM

Prime Designer: Sitts & Hill Engineer

Traffic Engineer: Transpo

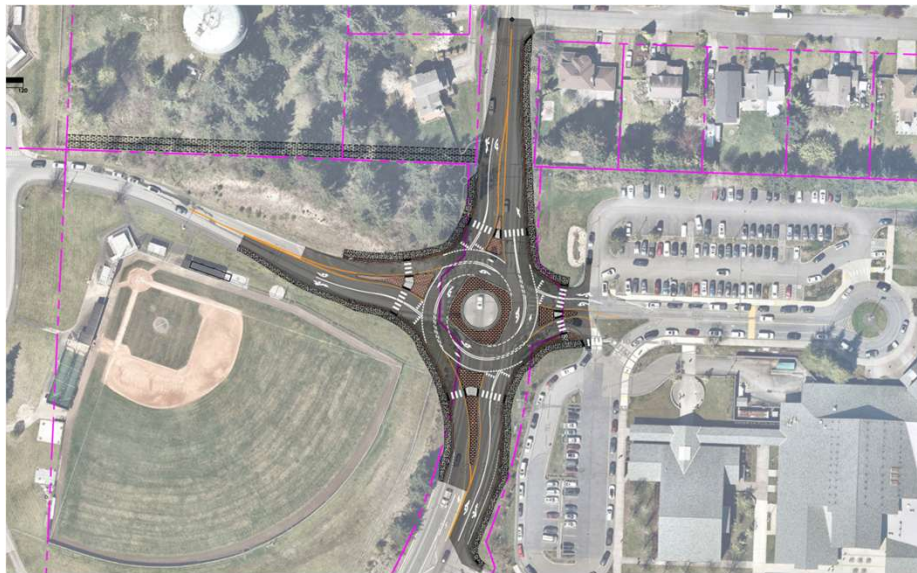
Landscape Architect: Fora Landscape Architects

Bonney Lake HS Intersection

- Initial comments on turning movement analysis received from City of Bonney Lake
- Traffic Impact Analysis submitted to City and first comment received
- Civil design underway.

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Bonney Lake HS Intersection



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Bonney Lake HS Expansion & Intersection

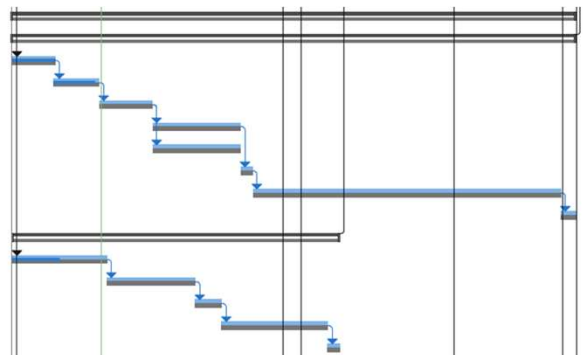
Budget Status		
Project Budget (includes all contingencies)		\$ 76,882,286
Costs to Date		\$ 1,863,247
Percent Spent		2.4%
Project Contingencies		
Construction		\$ 4,934,054
Support Costs		\$ 1,520,548
Program		\$ 1,537,645
Contingency Accessed to Date		\$ 0

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Bonney Lake HS Expansion & Intersection

- Schedule

BLHS	958 days	Mon 2/3/25	Wed 10/4/28	14%	
BLHS Expansion	958 days	Mon 2/3/25	Wed 10/4/28	13%	
Edspec	75 days	Mon 2/3/25	Fri 5/16/25	100%	2
Schematic Design	79 days	Tue 5/13/25	Fri 8/29/25	90%	18FS-4 days
Design Development	90 days	Mon 9/1/25	Fri 1/2/26	0%	19
Construction Drawings	150 days	Mon 1/5/26	Fri 7/31/26	0%	20
Permit	150 days	Mon 1/5/26	Fri 7/31/26	0%	20
Bid	20 days	Mon 8/3/26	Fri 8/28/26	0%	21
Construct	523 days	Mon 8/31/26	Wed 8/30/28	0%	23
Occupy	25 days	Thu 8/31/28	Wed 10/4/28	0%	24
BLHS Intersection	555 days	Wed 2/5/25	Tue 3/23/27	14%	
Develop Civil & LS Drawings	160 days	Wed 2/5/25	Tue 9/16/25	50%	2
Permit	150 days	Wed 9/17/25	Tue 4/14/26	0%	27
Bid	45 days	Wed 4/15/26	Tue 6/16/26	0%	28
Construct	180 days	Wed 6/17/26	Tue 2/23/27	0%	29
City Acceptance	20 days	Wed 2/24/27	Tue 3/23/27	0%	30



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Sumner High School Master Plan

PROJECT TEAM

Architect: Hutteball + Oremus Architecture, Inc.

GC/CM Contractor: Skanska USA Building

Structural Engineer: PCS Structural Solutions

Mechanical Engineer: Metrix Engineers

Electrical Engineer: Hargis Engineers

Civil Engineer: Jacobsen Consulting Engineers

Landscape Architect: For a Landscape Architects

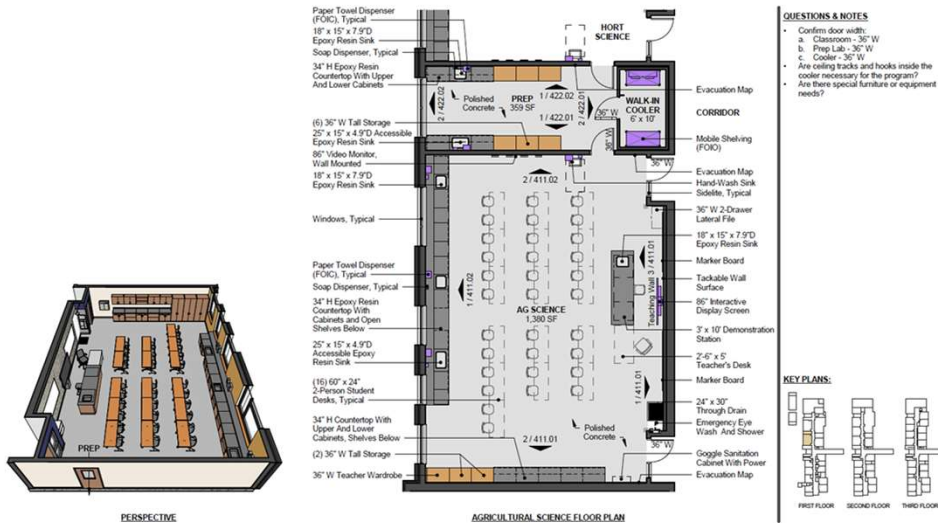
19

Sumner High School Master Plan

- GC/CM chosen and under contract.
- Construction Documents underway.
- Exterior and interior material and color palettes under review.
- Value Engineering presented to the School Board at the December 16 board meeting.

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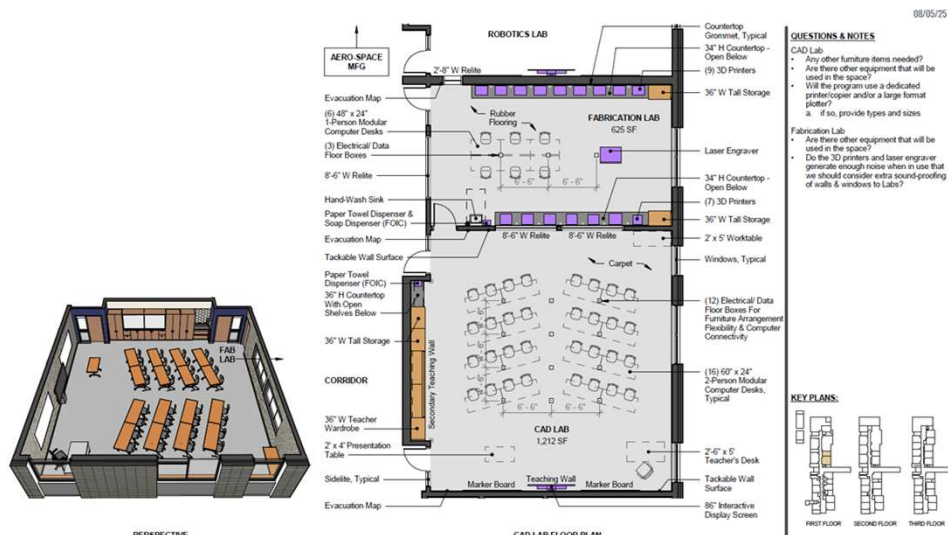
Sumner HS Phase II



HUTTEBALL + OREMUS
4010 LAKE WASHINGTON BLVD NE, SUITE 320, KIRKLAND, WA 98033
P 425.828.8948 W | HDMARCH.COM

300/400 - CAREER & TECHNICAL EDUCATION // AGRICULTURAL SCIENCE LAB
SUMNER HIGH SCHOOL ADDITION - PHASE II
SUMNER-BONNEY LAKE SCHOOL DISTRICT
411.00

Sumner HS Phase II



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SUMNER HIGH SCHOOL ADDITION - PHASE II
SUMNER-BONNEY LAKE SCHOOL DISTRICT
351.00

Sumner HS Phase II



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Sumner High School Master Plan – West Building

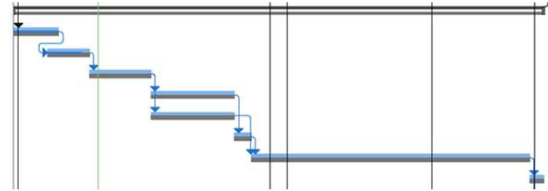
Budget Status		
Project Budget (includes all contingencies)		\$113,540,360
Costs to Date		\$ 3,551,314
Percent Spent		3.1%
Project Contingencies		
Construction		\$ 7,947,825
Support Costs		\$ 3,000,000
Program		\$ 2,000,000
Contingency Accessed to Date		\$ 0

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Sumner High School Master Plan

- Schedule

SHS Phase 2 - West Building	950 days	Wed 2/5/25	Tue 9/26/28	13%	
EdSpec	80 days	Wed 2/5/25	Tue 5/27/25	100%	2
Schematic Design	75 days	Wed 4/30/25	Tue 8/12/25	80%	33FS-20 days
Design Development	110 days	Wed 8/13/25	Tue 1/13/26	0%	34
Construction Drawings	150 days	Wed 1/14/26	Tue 8/11/26	0%	35
Permit	150 days	Wed 1/14/26	Tue 8/11/26	0%	35
Bid	30 days	Wed 8/12/26	Tue 9/22/26	0%	36
Construct	500 days	Wed 9/23/26	Tue 8/22/28	0%	38,37
Occupy	25 days	Wed 8/23/28	Tue 9/26/28	0%	39



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New Middle School @ Tehaleh

PROJECT TEAM

Architect: McGranahanPBK

Structural Engineer: PCS Structural Solutions

Mechanical/Electrical Engineer: Hargis Engineers

Civil Engineer: Sitts & Hill Engineers

Landscape Architect: Fora Landscape Architects

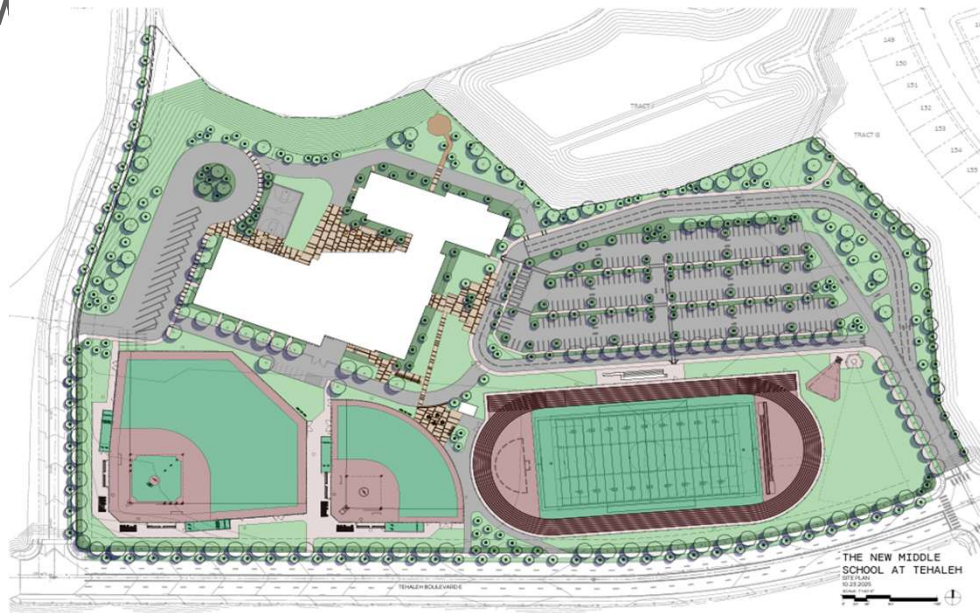
26

New Middle School @ Tehaleh

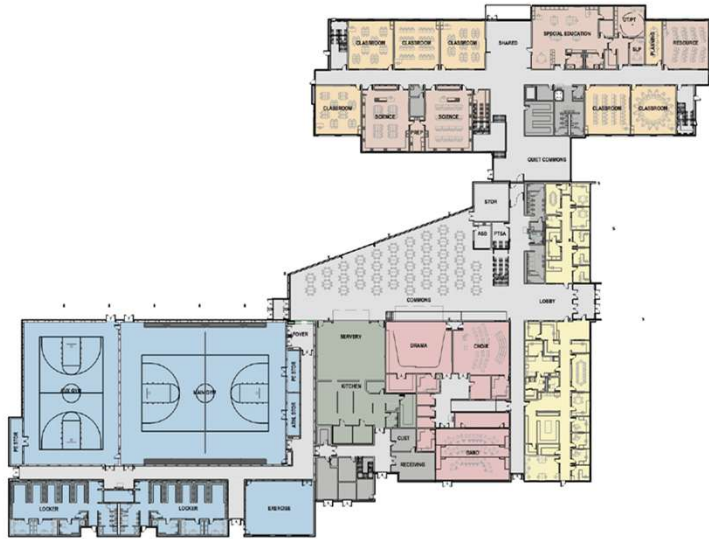
- Schematic Design presented to the School Board at the December 16 board meeting.
- Test wells for ground-source heat pumps underway.
- Design Development underway.

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New



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- ADMINISTRATION
- ADMINISTRATION - STUDENT SERVICES
- BLDG SUPPORT - CIRCULATION
- BLDG SUPPORT - MECH, TOILETS, STORAGE
- COMMON AREAS - COMMONS
- CORE INSTRUCTION - GENERAL
- CORE INSTRUCTION - LAB
- SPECIALIZED INSTRUCTION
- SPECIALTIES - ART, MUSIC
- SPECIALTIES - PE, GYM
- STUDENT DINING / FOOD SERVICE
- STUDENT SUPPORT - SHARED LEARNING



First Floor Plan

New Middle School at Totalin



Main Entrance Aerial



Main Entrance

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Commons

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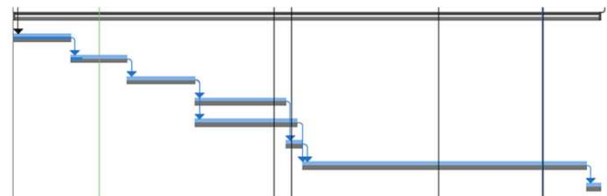
New Middle School @ Tehaleh

Budget Status		
Project Budget (includes all contingencies)		\$200,000,000
Costs to Date		\$ 1,728,822
Percent Spent		0.86%
Project Contingencies		
Construction		\$ 9,280,592
Support Costs		\$ 8,000,000
Program		\$ 3,000,000
Contingency Accessed to Date		\$ 0

New Middle School @ Tehaleh

- Schedule

Tehaleh Middle School	1035 days	Wed 2/5/25	Tue 1/23/29	10%	
EdSpec	100 days	Wed 2/5/25	Tue 6/24/25	100%	2
Schematic Design	100 days	Wed 6/25/25	Tue 11/11/25	20%	42
Design Development	120 days	Wed 11/12/25	Tue 4/28/26	0%	43
Construction Drawings	160 days	Wed 4/29/26	Tue 12/8/26	0%	44
Permit	180 days	Wed 4/29/26	Tue 1/5/27	0%	44
Bid	30 days	Wed 12/9/26	Tue 1/19/27	0%	45
Construct	500 days	Wed 1/20/27	Tue 12/19/28	0%	46,47
Occupy	25 days	Wed 12/20/28	Tue 1/23/29	0%	48



Daffodil Valley Elementary Field Improvements

PROJECT TEAM

Landscape Architect: Second Nature Consulting

Civil Engineer: Momentum Civil

Architecture: Zervas Group

Structural Engineer: Kingworks

Mechanical/Electrical Engineer: Hultz BHU

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Daffodil Valley Elementary Field Improvements

- Plans submitted to the City of Sumner for review and approval.
- Developing field lighting.
- Outdoor learning concept approved.

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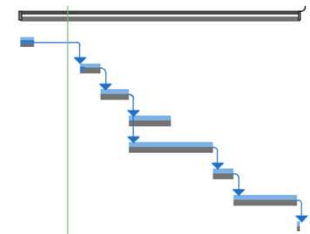
Daffodil Valley Elementary Field Improvements

Budget Status		
Project Budget (includes all contingencies)		\$ 6,022,014
Costs to Date		\$ 125,548
Percent Spent		2%
Project Contingencies		
Construction		\$ 281,000
Support Costs		\$ 480,000
Program		\$ 120,000
Contingency Accessed to Date		\$ 0

Daffodil Valley Elementary Field Improvements

- Schedule

Daffodil Valley Field	400 days	Mon 6/2/25	Fri 12/11/26	7%	
EdSpec	20 days	Mon 6/2/25	Fri 6/27/25	100%	
Schematic Design	30 days	Mon 9/29/25	Fri 11/7/25	20%	89
Design Development	40 days	Mon 11/10/25	Fri 1/2/26	0%	90
Construction Drawings	60 days	Mon 1/5/26	Fri 3/27/26	0%	91
Permit	120 days	Mon 1/5/26	Fri 6/19/26	0%	91
Bid	30 days	Mon 6/22/26	Fri 7/31/26	0%	93
Construct	90 days	Mon 8/3/26	Fri 12/4/26	0%	94
Occupy	5 days	Mon 12/7/26	Fri 12/11/26	0%	95



Donald Eismann Elementary Parking, Queuing and Field Improvements

PROJECT TEAM

Civil Engineer: Ethos Civil

Landscape Architect: KG Designs

Electrical Engineer: Tres West Engineers

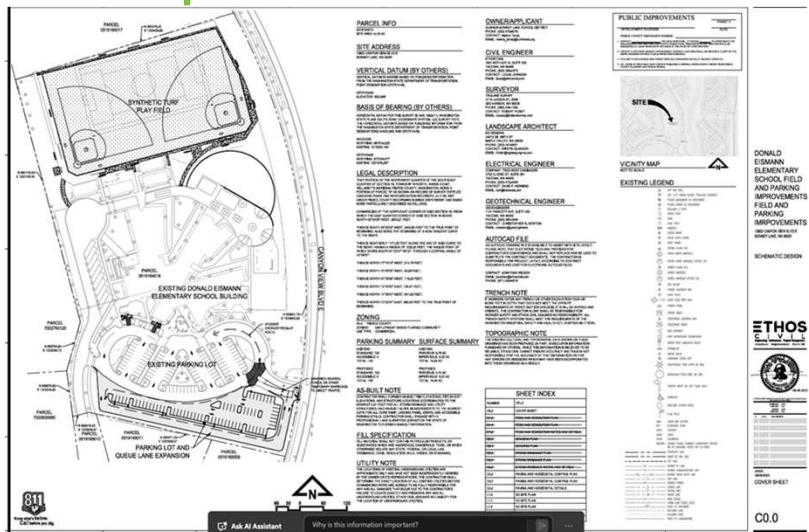
41

Donald Eismann Elementary Parking, Queuing and Field Improvements

- Received approval from the Tehaleh Architectural Review Committee.
- Plans submitted to Pierce County for review and approval.

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Donald Eismann Elementary Parking, Queuing and Field Improvements



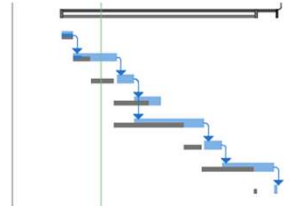
Donald Eismann Elementary Parking, Queuing and Field Improvements

Budget Status		
Project Budget (includes all contingencies)		\$ 7,806,605
Costs to Date		\$ 168,136
Percent Spent		2.2%
Project Contingencies		
Construction		\$ 364,308
Support Costs		\$ 624,528
Program		\$ 156,132
Contingency Accessed to Date		\$ 0

Donald Eismann Elementary Parking, Queuing and Field Improvements

- Schedule**

Donald Eisman Queueing & Field	370 days	Mon 6/2/25	Fri 10/30/26	8%	
EdSpec	20 days	Mon 6/2/25	Fri 6/27/25	100%	
Schematic Design	75 days	Mon 6/30/25	Fri 10/10/25	20%	80
Design Development	30 days	Mon 10/13/25	Fri 11/21/25	0%	81
Construction Drawings	45 days	Mon 11/24/25	Fri 1/23/26	0%	82
Permit	120 days	Mon 11/24/25	Fri 5/8/26	0%	82
Bid	30 days	Mon 5/11/26	Fri 6/19/26	0%	84
Construct	90 days	Mon 6/22/26	Fri 10/23/26	0%	85
Occupy	5 days	Mon 10/26/26	Fri 10/30/26	0%	86



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Crestwood Elementary Improvements

PROJECT TEAM

Architect: Studio Meng Strazzara

Mechanical/Electrical Engineer: Hargis

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Crestwood Elementary Improvements

- Scoping of project underway.
- Design concepts for security vestibule and front office in development.

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Crestwood Elementary Improvements

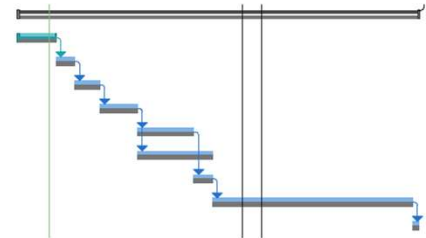
Budget Status		048
Project Budget (includes all contingencies)		\$ 2,885,048
Costs to Date		\$ 21,015
Percent Spent		0.73%
Project Contingencies		
Construction		\$ 134,636
Support Costs		\$ 44,689
Program		\$ 223,751
Contingency Accessed to Date		\$ 0

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Crestwood Elementary Improvements

- Schedule

Crestwood Improvements	640 days	Fri 6/27/25	Thu 12/9/27	8%	
Architect Selection	60 days	Fri 6/27/25	Thu 9/18/25	100%	
EdSpec	30 days	Fri 9/19/25	Thu 10/30/25	0%	61
Schematic Design	40 days	Fri 10/31/25	Thu 12/25/25	0%	62
Design Development	60 days	Fri 12/26/25	Thu 3/19/26	0%	63
Construction Drawings	90 days	Fri 3/20/26	Thu 7/23/26	0%	64
Permit	120 days	Fri 3/20/26	Thu 9/3/26	0%	64
Bid	30 days	Fri 7/24/26	Thu 9/3/26	0%	65
Construct	320 days	Fri 9/4/26	Thu 11/25/27	0%	67
Occupy	10 days	Fri 11/26/27	Thu 12/9/27	0%	68



Liberty Ridge Elementary Improvements

PROJECT TEAM

Architect: fi Archecture

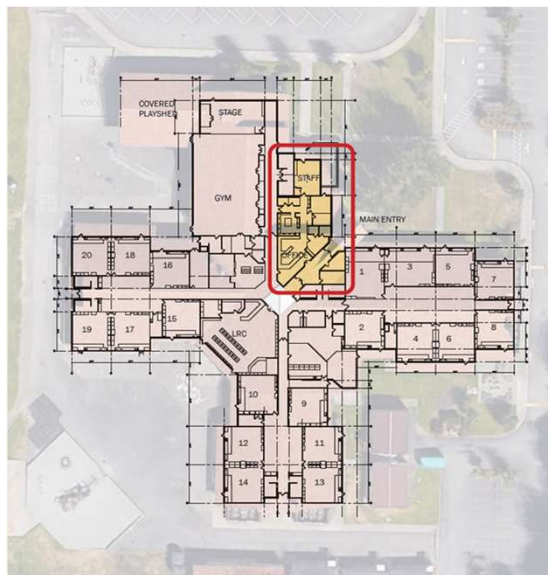
Mechanical/Electrical Engineer: TBD

Liberty Ridge Elementary Improvements

- Scoping of project underway.
- Design concepts for security vestibule and front office in development.

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Liberty Ridge Elementary Improvements



SCOPE OF WORK

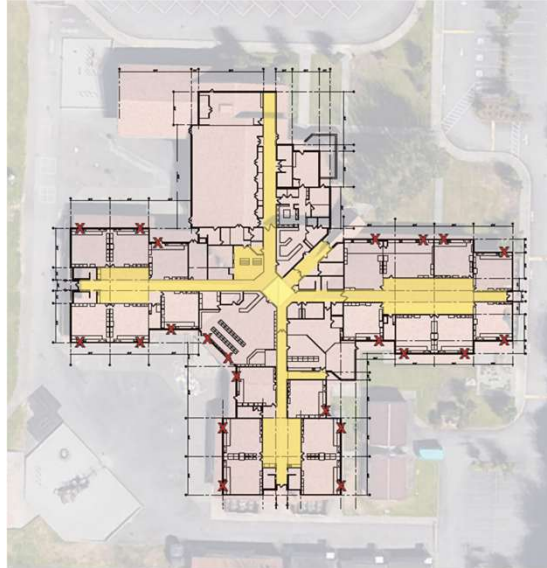
Front Office Modernization

- Vestibule
- Reception Area
- Offices
- Staff Lounge
- Workroom
- Keep original bell out front



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Liberty Ridge Elementary Improvements



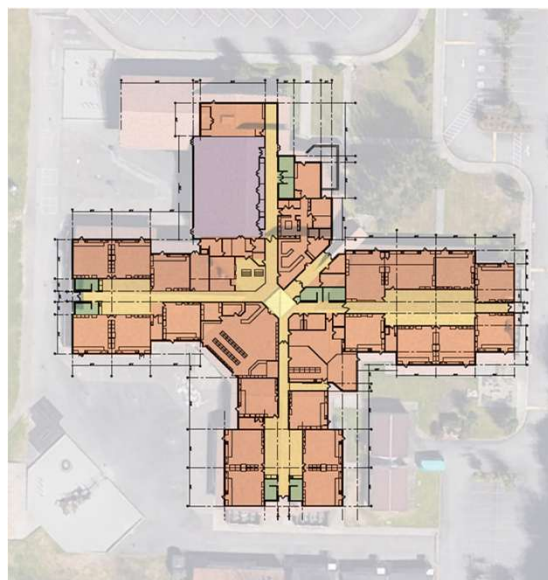
SCOPE OF WORK

Exterior Classroom Doors

- Remove and infill openings
- Improved access controls
- Revised exiting pathways



Liberty Ridge Elementary Improvements



SCOPE OF WORK

New Interior Finishes

- New wood gym floor
- New flooring throughout
 - Classrooms
 - Corridors
 - Support spaces
- Paint walls throughout



Liberty Ridge Elementary Improvements

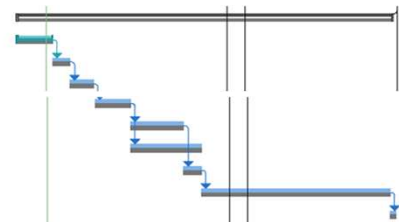
Budget Status		048
Project Budget (includes all contingencies)		\$ 2,885,048
Costs to Date		\$ 15,998
Percent Spent		0.55%
Project Contingencies		
Construction		\$ 134,636
Support Costs		\$ 44,689
Program		\$ 223,751
Contingency Accessed to Date		\$ 0

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Liberty Ridge Elementary Improvements

- Schedule**

LRE Improvements	640 days	Fri 6/27/25	Thu 12/9/27	8%	
Architect Selection	60 days	Fri 6/27/25	Thu 9/18/25	100%	
EdSpec	30 days	Fri 9/19/25	Thu 10/30/25	0%	51
Schematic Design	40 days	Fri 10/31/25	Thu 12/25/25	0%	52
Design Development	60 days	Fri 12/26/25	Thu 3/19/26	0%	53
Construction Drawings	90 days	Fri 3/20/26	Thu 7/23/26	0%	54
Permit	120 days	Fri 3/20/26	Thu 9/3/26	0%	54
Bid	30 days	Fri 7/24/26	Thu 9/3/26	0%	55
Construct	320 days	Fri 9/4/26	Thu 11/25/27	0%	57
Occupy	10 days	Fri 11/26/27	Thu 12/9/27	0%	58



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Tehaleh Heights Elementary Expansion

- **PROJECT TEAM**
- **Architecture:** McGranahanPBK
- **Mechanical/Electrical Engineer:** Hargis
- **Structural Engineer:** PCS Structural Solutions
- **Landscape Architect:** Fora Landscape Architects
- **Civil Engineer:** Sitts & Hill

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Tehaleh Heights Elementary Expansion

- Received Project Review Committee approval for GC/CM on December 5
- Advertised for Statements of Qualification December 8th.
- Interactive meetings with GC/CM candidates on January 28.
- Selection to the School Board on February 19.

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Tehaleh Heights Elementary Expansion



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Tehaleh Heights Elementary Expansion



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Tehaleh Heights Elementary Expansion

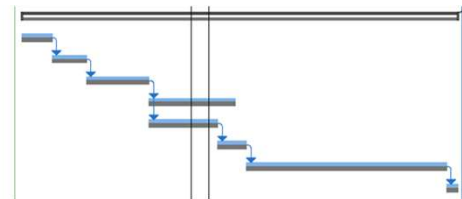
Budget Status		
Project Budget (includes all contingencies)		\$19,019,250
Costs to Date		\$ 9,632
Percent Spent		0.05%
Project Contingencies		
Construction		\$ 1,318,985
Support Costs		\$ 237,016
Program		\$ 16,500
Contingency Accessed to Date		\$ 0

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Tehaleh Heights Elementary Expansion

- Schedule

Tehaleh Heights Elementary	763 days	Mon 9/22/25	Wed 8/23/28	0%	
EdSpec	53 days	Mon 9/22/25	Wed 12/3/25	0%	
Schematic Design	60 days	Thu 12/4/25	Wed 2/25/26	0%	71
Design Development	110 days	Thu 2/26/26	Wed 7/29/26	0%	72
Construction Drawings	150 days	Thu 7/30/26	Wed 2/24/27	0%	73
Permit	120 days	Thu 7/30/26	Wed 1/13/27	0%	73
Bid	50 days	Thu 1/14/27	Wed 3/24/27	0%	75
Construct	350 days	Thu 3/25/27	Wed 7/26/28	0%	76
Occupy	20 days	Thu 7/27/28	Wed 8/23/28	0%	77



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COMMITTEE BUSINESS

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COMMITTEE BUSINESS

- **BOC Meeting #3 requests**
- **Draft outline of Annual Community/School Board Report**
- **Committee Discussion**

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Questions / Requests from September BOC Meeting

Asked

1. Input on what to include in annual report

Response

1. All included in detailed outline

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Annual Report

- I. Introduction & executive summary
- II. BOC makeup and activities
- III. Bond funding overview
- IV. BOC's work
- V. BOC's findings
- VI. BOC's recommendations
- VII. Next year's forecast
- VIII. Any proposed changes to project schedules, sequences or finances

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BOC Key Findings, Recommendations, and Proposed Changes

- Are funds being spent appropriately and in compliance with the bond measure?
- Any risks and opportunities to address?
- Are projects progressing according to the Master Schedule?
- Is communication between the District, Project Managers, and the BOC effective?
- Anything else you want to add to this section?

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Conclusion and Appreciation

- What do you want to say?

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BOC Meeting Outcomes

We learned about:

- .

Key messages:

- .

WHAT'S
AHEAD

WHAT'S AHEAD

- Preview of Meeting #4, January 26, 2026 (inclement weather – virtual option)
- Annual Report review and revise as needed - seeking consensus
- Questions for BOC Discussion at January meeting

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WRAP UP

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WRAP UP

- **Key messages**
 - **What were the key outcomes of this meeting?**
- **Evaluation**
- **Process**
 - **Content**
 - **Discussions**
- **Gratitude and adjournment**

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THANK YOU

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