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2024 Bond Projects - Bond Oversight Committee Meeting June 30, 2025

Meeting Summary

Date: June 30, 2025

Location: Sumner-Bonney Lake School District (SBLSD) Administration Building

Meeting Attendance:

SBLSD Project Team

Organization / Title	Name
SBLSD Superintendent	Laurie Dent, PhD
SBLSD Director of Capital Projects	Marina Tanay
SBLSD Capital Projects Manager	John Boatman
Falcon & Fern Program Manager	Matt Guilanians
Definitely Mabie Consulting LLC, Facilitator	Penny Mabie

Bond Oversight Committee Members

Organization/Entity/Interest	Name
Construction/architect/engineering/planning	Eric Pilchur
Construction/architect/engineering/planning	James Lawrence
Business Organization	Wilbur Clark
Owns/operates/senior leadership	Randy Kroum
Finance/accounting fields, financial	Justin Evans
Finance/accounting fields, financial	Bill Davis
Parent	Jenn Dery
Parent	Tamara Stramel
Capital Facility Advisory Committee	Derek Barry
Capital Facility Advisory Committee	Penny Kreil
Capital Facility Advisory Committee	Tiffany Binkowski
Capital Facility Advisory Committee	Neil Symes

Additional Attendees

SBLSD, Thu Ament

SBLSD, Paige Scroger

Welcome and Introductions. Laurie Dent, Superintendent, SBLSD, welcomed all to the meeting and introduced Penny Mabie, Bond Oversight Committee (BOC) facilitator. The District project team introduced themselves and BOC members introduced themselves and spoke about their commitment to the community.

- James – Make sure what the community voted on takes place
- Neil – Make sure we do what we said we would do.
- Bill – People get what they paid for.



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- Derek – Communications
- Tamara – Lots of voters' ears in my mind.
- Penny – Accountability and transparency
- Eric – Our design/construction fees are in line
- Randy – Make sure we're delivering these projects and timelines are adequate
- Justin – Accountability and transparency
- Tiffany – Make sure the bond they approved does what it's supposed to do and we follow through on what we said we would do.
- Wilbur – On time and under budget

Committee Business

Penny Mabie, Facilitator, Definitely Mabie Consulting LLC, led the committee through proposed adjustments to the Committee's draft charter, which was first discussed at the BOC's March 29, 2025 meeting.

Committee questions/comments:

- Proposed adding 'operational readiness' to the Oversight paragraph under Board Function. During discussion, it was clarified that this applies only to readiness elements associated with bond expenditures.

ACTION: The Committee, by consensus, approved the revised charter, with the requested addition of operational readiness.

2024 Bond Project General Information

Laurie provided information on the first bond sale, for \$175,164,484, which had an excellent result. The District received a credit rating Aa3 and a Positive Outlook, one of the few districts that got this rating. The sale outperformed the market on that date. There are three more sales scheduled – in 2027, 2028 and 2029.

Committee questions:

- Do the bond proceeds have to be spent by a certain date? *Response: Yes, to avoid paying tax on interest earned (Armitage).*

Marina Tanay, Director of Capital Projects, SBLSD provided an overview of the Consultant Selection Process, which has different requirements based on the dollar amount of the award (above or below \$500,000.) For more details, she referred the Committee to a Reference Document provided ahead of the meeting: [Purchasing, Bidding, Contracting, and Environmental Policies](#). She reported there has been no change to the overall budget or schedule for spending. Marina shared potential risks and opportunities being monitored.

Risks: The project team is starting to see tariff charges added to contractors' bills. Marina noted the team will be monitoring impacts from national tariff and will provide proposed responses if/when it becomes necessary.

Opportunities: SLBSD is looking to use a delivery method for contracting the biggest three school projects called General Contractor/Construction Manager (GC/CM) instead of the traditional Design-Bid-Build method. In the traditional method, the owner (SBLSD) would hire an



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architect to design the project, receive bids from contractors, and then hire the lowest bidder to construct it. Using the GC/CM method, SBLSD would engage the contractor during the design phase to provide valuable input on cost, constructability, and scheduling, fostering a collaborative environment with the owner and design team, and allowing for early work to begin. SBLSD is looking for an advisor to help with presenting GC/CM as a proposed method. The district will apply to the state to be able to use GCCM. Applications will be put in in August and the district will go to the Washington State Department of Enterprise, Project Review Committee in September for review and approval.

Marina discussed another opportunity – the Bill Heath Sports Complex. The City of Sumner approached SBLSD asking if the district was interested in purchasing the Complex. This purchase would give the district an opportunity to have baseball and fast pitch softball dedicated in one area. This opportunity is in the discussion phase.

Committee comments/questions:

- Be cautious about GC/CM and when you bring on the contractor. Early bid packages need to be ready.
- Does current law require Design/Bid/Build? *Response: Yes, unless you get permission to use alternate delivery methods from the state's Project Review Committee.*
- Is there a dollar trigger for GC/CM? *Response: No, it's more about what kind of project it is – complexity, etc.*
- Matt Guilanians, Program Manager, Falcon & Fern, noted that he and John Boatman, Capital Projects Manager, SBLSD, have lots of experience with all kinds of project delivery.
- Does the economy play into this decision? *Response: The current economy and lack of many school bonds passing means there is more competition for our projects. Generally, GC/CM makes more sense on larger, complex projects. It is often used by owners to control costs.*
- What are the project contingencies? *Response: There are three different contingencies included in the budgets.*
 - *Construction contingency is about 7%*
 - *Support contingency (architecture, engineering, furniture, fixtures and equipment (FFE), etc.) is approximately 2%*
 - *Program contingency is 2%. This is to cover whatever may happen*
- Is there a memorandum of understanding (MOU) or some agreement between the county and the city as to how permits go? *Response: The city generally takes the lead on permitting. However, we have to pull permits from both.*

2024 Bond Projects – Project-by-Project Update (see [presentation](#) on website for project details)

Bonney Lake High School Expansion & Intersection – Matt noted the architect has been selected and contracted. Schematic Design is underway for the expansion. Design of the roundabout has begun.



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Sumner High School – Matt provided an update on progress at Sumner High School. He noted the Sumner High School Master Plan budget has been split into east side and west side. The contingencies were split as well. The project is on track with its schedule.

Committee comments/questions:

- Did new geotechnical work have to be done? *Response: The architect wanted cone penetration tests (CPT) at certain points, so we did those.*
- Have the architect and other contractors been hired? *The architect is hired. The district has the architect hire other firms so the district doesn't have to be responsible for their work. The district hires geotechnical firms directly.*

New middle school at Tehaleh – Matt provided an overview. He noted that this project is the last of the three big projects (Sumner High School, Bonney Lake High School and new middle school) in terms of the order of the schedule. The land acquisition process is ongoing and schematic design is underway.

Committee comments/questions:

- Does this include any road construction? *Response: Tahaleh does all road work up to the driveway. The site will be "pad ready" with utilities stubbed in when the district takes it over.*
- Will this school include a driveway? *Response: Yes.*

Daffodil Valley Elementary Field Improvements – Matt noted the contracts have been signed. The Designer is a firm called Second Nature. The field will be all turf. The geotechnical work has been delayed until after the Bill Heath Sports Complex decision is made.

Donald Eismann Elementary Parking, Queueing, and Field Improvements – Matt informed the committee the design team has been selected, a purchase order has been issued to the civil engineer taking the lead on the project, and an initial concept for the parking lot and queueing has been prepared. The schedule is a little bit behind. This design has to go to Tehaleh for review before going to the county.

Committee comments/questions:

- Be sure to think about parents who need to get to school to park. They don't want to wait in queue. This often causes conflicts with outbound traffic.
- Consider changing the norm from one car in and two out to two cars in and one out.

What's Ahead?



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Penny asked the committee what they thought of the format of the meeting. The team is proposing to use this format for all meetings moving forward. The committee agreed to use the meeting format.

Penny asked what other questions or topics the BOC would like to take on in September.

Committee comments/questions:

- How are we thinking about where students will be going during construction?
Response: While we have some general thoughts, site management will be determined during the design phase of the project.
- It's fairly easy to follow all the projects in the construction schedule. Do we have a similar schedule for the budget that allows us to see at a glance how all the projects are tracking to the budget, married up to the timeline? *Response: We will work on that.*
- Where would we see scope creep? For instance, adding classrooms as was discussed for the Bonney Lake High School Expansion, because there was extra space. Is that adding additional cost or just taking advantage of opportunity?
Response: In the bond language, the addition size is not specified. While we had an estimate for classroom numbers in the planning for the bond, it was only an estimate. The driving factor is the cost for the project in the bond.
 - If cost is less than originally planned for the original number of classrooms, could money be saved by not adding the classrooms?
 - How are these types of decisions being made? If we can do more, should we? We need to discuss this in the annual report.
 - Is it legally defensible? Most people want to meet the growth.
 - If classrooms aren't added and the design ends up with less square footage than was in the bond, is that a concern?
 - Might a member of the community wonder what it would cost to build the additional six classrooms later? *Response: As the classroom numbers were only an estimate, there is really no "original number of classrooms", so there wouldn't really be any cost savings. Square footage / number of classrooms were estimates, not limiting factors.*
 - Can we get schematics / floor plans? *Response: Yes.*
 - Is there any update on Tehaleh Heights Elementary School? *Response: It is the next project up. We do not have the architect hired yet.*
 - When will boundaries be decided after the third middle school is completed? *Response: Our demographer is looking at the data. We will begin the boundary considerations in 2027 – two years ahead of completion. The demographer is figuring out feeder patterns. The boundaries will change in 2029/30.*
 - Do you try to keep cohorts together? *Response: Yes.*
 - Can we get an updated Gantt chart of all projects? *Response: Yes.*

Wrap Up

Key messages from the meeting

- Contracting methodology – can differ depending on the project



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- The first couple of projects have kicked off
- We reviewed schedules and budgets
- We reviewed project timelines – everything is moving forward
- Additional support staff has been added to the SBLSD project team
- We approved our charter

Committee questions/comments

We should come up with a consistent way of capturing 'this is what we learned' and these are our talking points.

Evaluation

- The committee was generally favorable about the meeting and approved of the meeting format being used in future meetings.

Meeting Adjourned