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2024 Bond Projects - Bond Oversight Committee Meeting #4, January 26, 2026

Meeting Summary

Date: January 26, 2026

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, Tricia Nicholas

SBLSD, Elle Warmuth

SBLSD, Allina Holmquist

SBLSD, Paige Schroeder

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. Penny Mabie, Definitely Mabie Consulting, facilitator, asked the committee members what they have been hearing from the community.



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Committee comments:

- People are concerned about reboundarying. They are hearing questions such as What's going to happen? Will we still be able to choose where we go? What does this mean for us?
- For the elementary school projects, people ask "What is it going to look like? "Will students be moved around?" "How soon will things change?"
- People have gotten used to not using classroom exterior doors.
- People are a little apprehensive about roundabouts. *Response: We can keep reminding people that the middle school population will shrink once the new middle school at Tehaleh is finished. That will ease some traffic pressure.*
- People are more concerned about boundaries than construction.
- People are concerned they will get pushed out of the district.

2024 Bond Project General Information

Marina Tanay, Director of Capital Projects, SBLSD, provided updates on the 2024 Bond Projects budget, schedule, risks, and opportunities.

Budget: The overall budget is still on track. There have not been many large expenditures yet as the first phase of projects are still in the early stages of procurement and conceptualization.

Schedule: At this time, all projects are still within their stated schedule.

Risks: The economy continues to provide uncertainty due to shifting tariff decisions and inflation risks. Marina noted the team will be monitoring impacts from national tariff decisions and other federal decisions and will provide proposed responses if/when it becomes necessary.

Marina noted that as projects prepare for or are entering permitting processes, that presents new risks. She shared that because the timing of permit processing is not in SBLSD's control, managing the risk can be challenging.

Opportunities: The District is considering early bid packages for projects that are more complex and have early site work needs, have specialty equipment with long lead times, or both. This allows us to competitively bid smaller scopes earlier, allowing the project to finish earlier. Additionally, due to requirements in the GC/CM contracting process, the District sees an opportunity to increase local and minority and women-owned contractors working on our projects. For GC/CM projects there are recommended percentages of the contract value that should go to local, small and women/minority owned businesses. The District will work with the prime contractors to figure out how to meet those percentages in a meaningful way.

Committee comments/questions:

- Do we have any hesitation about permitting? *Response: Yes, the timing can be challenging. As an example, it took seven months to get permits for a small*



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Lakeridge project. While we cannot control the permitting process, we have built good relationships with the cities which should help mitigate the risks.

- Pierce County Sewer permitting is really slow now.
- For the GC/CM local, small and minority/women owned recommendations, how local is local? Does the percentage include disabled veterans? Are there any age considerations to encourage newer generations of contractors to bid on projects?

Response: We've instituted outreach programs with our contractors and we are targeting increased engagement from all of the above. Further we will structure our bid packages to create opportunities for small businesses.

- Consider adding a question to interviews: "How many Sumner/Bonney Lake alumni does your firm have?" *Response: That would be interesting data to gather. We will consider asking this in future interviews.*

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

Matt Guilanians, Falcon and Fern, Program Manager, presented updates on all the projects in the 2024 Bond Projects.

Bonney Lake High School (BLHS) Expansion & Intersection – SLBSD has procured Korsmo as the General Contracting/Construction Management (GC/CM) contractor. Korsmo is currently getting into the specifics of design details. The School Board has approved the schematic design and the Value Engineering results. A color palette for the expansion has been finalized. The building permit is either submitted or about to be submitted. The District is asking the City of Bonney Lake about an expedited permitting process and what the cost for that would be. For the intersection project, the geometry of the intersection has been approved. The engineers can now do their design based on the approved geometry. The District is awaiting a cost estimate from the contractor. The BLHS Expansion & Intersection project is still on schedule for its start date. To keep things moving, the District is doing a mini contract to get started on early work.

Committee comments/questions:

- Is the roundabout smaller than the one in Tehaleh? *Response: No, it is similar in size.*
- How far apart are the contractor and the designer in the budget reconciliation? *Response: We're on the verge of our first real reconciliation. We will report on this at the next BOC.*

Sumner High School (SHS) Master Plan – Matt noted the Sumner High School Master Plan design is on track. Permits will be submitted in the next week. The team has started a separate side effort to plan for Phase 3. They have been working out the transitions between different parts of the project. They are looking at the possibility of keeping the old gym operating while building the new gyms. The Performing Arts Center and the Pool will be out of commission for a long period – as much as two years – during



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construction. The project is trending to be under or just at budget and the schedule is holding.

New middle school at Tehaleh – Matt shared they are still negotiating a purchase and sales agreement. He noted that this is a geo-thermal project, so a test is needed to understand how many geothermal wells will be required to meet the heating and cooling needs of the project. Matt shared conceptual images. He noted the color pallet is drawn from themes of Mt. Rainier hues, as the building faces the mountain. The schedule and budget are on track.

Committee comments/questions:

- Who is the ground contractor? *Response: The Orca Group.*
- Are the colors locked in? *Response: No, not yet. The Mt. Rainier palette is settled, but the specific colors are not.*

Daffodil Valley Elementary Field Improvements – Matt noted this project has been a little more challenging. They have reconfigured the batting cages and are moving the basketball court so they can make at least a U10 soccer field as well (possibly as big as U12). They are hoping to submit permits next week. They are conducting the state-required environmental review process under the State Environmental Policy Act (SEPA). The budget and schedule are comfortably on track.

Donald Eismann Elementary Parking, Queueing, and Field Improvements – Matt informed the committee the permit has been issued. The District is putting the contract documents together for the bidding of the project. The project budget status is very good. The project is on schedule and may even come in early.

Crestwood Elementary and Liberty Ridge Elementary – Mat informed the committee the project is a little behind because the scoping process is complicated. The schedule is about a month behind. They are getting into the details of the project and getting feedback from the staff. Matt noted the budget will increase, but there will not be an estimate until the scoping is complete and we have drawings to estimate from. The team is considering only doing summer construction to reduce impacts on students and staff with the exception of the siding work.

Tehaleh Heights Elementary Expansion – The District received approval from the state in December to use the GC/CM delivery method. The District is in the process of selecting contractors. The budget is on track as there has been hardly any funds spent yet. The schedule is generally on track for the school to open in the Fall of 2028.

Committee comments/questions:

- What was the thinking behind using two different architects for two very similar projects? *Response: This allows us to get good ideas from two different*



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architects that can be applied to both projects. We are also working to spread work out in the contractor environment.

- Why is this project using GC/CM? *Response: There are different criteria for when to use GC/CM. In this project, it is complexity that is driving the choice. We are cutting into an operating site, so there is significant complexity to the project.*
- It may be good to share with the committee what the interfaces are for additions. *Response: We will do that as more details get fleshed out.*

Tehaleh Heights Elementary Expansion - Matt the BOC that the team conducted interviews with the short-listed firms. He noted a member of the BOC joined in the hiring process by participating in the evaluations. In his overview, Matt noted replacing the gravel lot with a paved lot will be a big improvement. There are no red flags with the budget, and the design team thinks the budget is adequate. The project is close to schedule.

Committee comments/questions:

- What will be the naming process and when does it happen? *Response: There is a School Board policy that drives the name selection process. The policy is available online. We don't know the timing yet. We are still years ahead of that process.*

In summary, Matt shared that all but one of the 2024 Bond Projects are in design. The team is trying to go fast to minimize the risk of cost inflation. He noted that in addition to the bond funding, there will be a small amount of additional money from the Washington State Construction Assistance Program. This money comes at the end of a project. The District must have spent all of the local share before state match money is available. Those dollars were not factored into how much money was needed for the 2024 Bond Projects. If they are left over, they can be added to the Bond Projects as a bond modification for additional capital projects. The Bond funds must be spent. The IRS has arbitrage rules that state a district cannot "make money" on the bond funds (i.e. by leaving it in the bank and earning interest.) The District must have spent 85% of the bond funds by three years after the sale of the bonds.

Committee Business

Penny asked if there were any requests for the next BOC meeting.

- It would be good if the team could send out a monthly update. Mainly to share if anything has gone wrong. It could be a monthly executive summary-level update.

Annual report - Penny introduced the detailed draft outline of the BOC's Annual Community/School Board Report and asked for committee review. She asked the BOC if there was anything critical missing and if the organization of the outline works. She noted the BOC needed to provide input into Section V, which includes key findings, the 2026 BOC focus, and any conclusions.



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Committee questions/comments on the report contents:

- Use a table to show project dates. Put projects in order of opening dates.
- Make sure to note members of the BOC sat in on GC/CM meetings.
- Make a note about contingencies in budgets, so when a project runs high, there will be funds available to cover the extra costs.
- Mention how early it is in the process – budgets have not really been tapped because it is so early.
- Mention risks: What happens to the economy? What happens if permitting slows things down? What happens to long-term rates? Describe contingencies to mitigate these risks.

Committee findings for the report:

- Include that even though it is early in the process, everything seems to be going well.
- The District project team has been very good at being responsible with budgets.
- Things seem to be okay, although it is too soon to really know about budgets.
- I think this is the most transparent process I've ever been a part of.
- Communications have been great. Having information on the website is very helpful. It gives us a place to send folks who have questions.

2026/2027 BOC Focus:

- Understanding the critical risks to the project construction schedule.
- Updates on schedule.
- Updates on budget spent to date.
- More developed renderings to understand the scope of the work for each project.
- Timeline risks around permitting

Penny shared the next steps for the report are to add the BOC's content and complete the other sections. Then the draft report will be sent to the BOC for review via email, with the goal of approving the final report at the March meeting.

Wrap Up

BOC key messages from the meeting

- Projects remain on track, with the exception of Crestwood Elementary Improvements due to complex scoping.
- There is some budget pressure on Bonney Lake High School
- We recognize it is early and more process will reveal more details.

What's Ahead?

The next committee meeting is March 23, 2026. In addition to regular updates, the focus will be on finalizing the BOC's 2025/26 Annual Report.

Meeting Adjourned



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