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May 12, 2020

Shannon Bisgard, Superintendent
Linn Mar Community Schools
2999 N. Tenth Street
Marion, IA 52302

RE: Fee Proposal – District Facility Needs

Shannon:

Thank you for the opportunity to present our fee proposal for professional design services to assess the District's Facilities Needs and review of the 10-year capital plan. This is an important exercise due to the complexity of detailed evaluations of existing facilities and aligning the needs of the district. Understanding needed "next-steps" for renovations or new construction that can be understood and supported by the community requires deep interaction and communication. Fully understanding the impact of work required and providing defined costs for consideration by the District prior to moving forward for approval is a major undertaking for all involved.

Based upon our understanding of work required, we have developed our Scope of Work, Design Team, Schedule, and Fees as outlined below.

Scope of Work:

Evaluation of District Facility Needs – 10-Year Capital Plan. Work includes:

- a. Assist in assembling a district Facilities Advisory Committee to engage and drive the process forward to achieve consensus for future planning.
- b. Assessment of existing or potential new facilities to be considered for location, physical spaces and academic uses, with initial priorities including:
 - i. Existing High School – Determine Efficiency of Use for intended programs
 - ii. Existing Learning Resource Center – conversion of use for High School programs
 - iii. Auditorium – consider locations and design options for a potential new facility.
 - iv. Athletic/Recreation Facility – consider locations and design options for a potential new facility.
 - v. Elementary – potential and timing for a new, stand-alone facility.
 - vi. Administration Facility – potential and timing for new or renovated facility.
- c. Additional design considerations will be given to
 - i. Middle School – potential and timing for a new facility.
 - ii. Tennis Court locations.
 - iii. Use of former softball fields northwest of stadium.
 - iv. Use of Armstrong Field
 - ii. Review of past General Assessment of Existing Facilities.
 - iii. Creating district surveys to gather input from a wide cross-section of the community to understand needs.
 - iv. Evaluate Funding Options based on project timing and or phasing.
 - v. Evaluate design options for future projects on available property either currently owned by or to be acquired by the district.

Confirm district provided demographics, enrollment, school capacity, and utilization methodology: Work includes:

- a. Understanding the impact of current and future projected student population and associated performance of educational facilities.
 - b. Validate or create a Facility Use plan that reinforces needs to repurpose existing spaces or justify the need to construct new spaces.
- c. **Provide leadership in the design of Education facilities:** Work includes:
- a. Defining Key design drivers in the creation of learning spaces that enhance both student and instructor learning experience.
 - b. Utilization of current and future technology practices in the learning environment.
 - c. Applicable approaches to Sustainability in building design, systems, site amenities, materials, to enhance the ability to provide lower costs in operations and maintenance.
- d. **Identify Key Projects:** Work includes:
- a. Complete evaluations of all potential work that address the needs of the District, and determine the best approach in scope of projects, timeline, costs, phasing and long-term impact for education and ongoing budget management.
- e. **Conceptual Planning and Narratives:** Work includes:
- a. Initially explore multiple options to validate planning process and approach to district needs. This work will reflect user input and establish a clear path forward for future design refinement and cost estimating to be supported for a bond vote.
- f. **Assist and Support district's Facilities Advisory Committee:** Work includes:
- a. Leading the planning and conceptual design process, related graphics, cost estimate evaluations, overall project schedules, priority matrix, phasing approach, and implementation plan.
- g. **Facilitate District Engagement:** Work includes:
- a. Leading community open house(s) work sessions to listen to needs, concerns and priorities of all individuals participating in the planning process.
 - b. Learning what is viewed as important to the district, and how the community will support those needs.
 - c. Educating all users in the process of evaluations and determining best approach for the immediate and long-term implementation of immediate and future projects.
 - d. Participate in communicating with the district team and board of education to advise and inform of work status, findings, recommendations, and next steps as needed.

Additional work to include:

- Civil/site condition evaluations as required for demolition, grading, utilities, site access, and required site improvements upon the completion of any proposed work.
- Architectural conditions that impact existing design or planned modifications as needed to meet the intended use of the district. This work will also include assessment of applicable Building Codes and Life Safety requirements and impacts to existing construction.
- Structural, mechanical, electrical, and plumbing systems, to evaluate existing systems and determine the impact of requested modifications addressing the best options as needed for improvements.
- Review of existing reports for Fire Marshal comments, abatements, etc.
- Identify challenges of existing building systems.
- Understand major MEP systems throughout the buildings.

In an effort to maximize prior work completed within the District, the design team will utilize information gathered and included within the prior Facility Assessment completed by OPN Architects in July 2017.

Design Team:

Our core design team for this work is as follows:

- Architectural: OPN Architects
Roger Worm, Principal
Vicki Hyland, K-12 Knowledge Specialist
Carly Weber, Communications Specialist
Technical Staff (3)
- Engineering: Design Engineers (Mechanical, Electrical, Plumbing)
Kelly Harrer, Principal
Technical Staff (2)
- Civil Engineering: Hall and Hall
Brent Jackman, Principal
Technical Staff (1)
- Estimating: Stecker Harmsen
Lee Harmsen, Principal

Schedule:

The goal of the attached proposed Schedule is to complete the overall Capital Plan Assessment and Strategic Plan not later than January 2021. In general, the Schedule address's the following key dates, activities, and goals over the course of this work:

- June/August 2020: Build and Engage the Facilities Advisory Committee.



- Define objectives and priorities
- Build consensus amongst the FAC
- Define potential Strategic Plan approach, Phasing and Costs
- Design team performs Assessments and Evaluations
- September/November 2020: Confirm District Approach to Implementation
 - Define priorities to advance conceptual design
 - Develop/Refine Conceptual design options and costs
 - Confirm Capital Plan Timeline
- December 2020/January 2021: Finalize Plan to Implement
 - Finalize Conceptual Design of Key Priority Projects timing and costs.
 - Identify required phasing
 - Determine Funding and Timing to bid immediate projects
 - Tentative Issue for Bid date of January 2021.

We have addressed key steps and related timing to perform the Assessments, Conceptual Designs and Cost Estimates in a comprehensive manner that evaluates various scenarios for District consideration. From this, the multiple steps listed will advance work that best address the needs of the District.

Although we could accelerate the early phases of our work, we feel this would not be prudent – “quick does not produce quality”. Each step of our collective work must reinforce educational needs and budget alignment to maximize the best end results. It takes time to complete Community Engagement, build Community Trust, and build the level of detail needed to ensure the district is making sound decisions. We do not want to fracture the quality of work early in the process.

Fee Analysis:

The Design Team has evaluated the total estimated billable hours involved in the scope of work as outlined above, broken down as follows:

OPN Architects	572 hours	\$ 62,920
Design Engineers	188 hours	\$ 18,800
Hall and Hall	24 hours	\$ 2,640
Stecker Harmsen	<u>30 hours</u>	<u>\$ 2,700</u>
Totals	+/- 814 hours	\$ 87,060

Staff hours include time commitments of principal, project manager, K-12 Knowledge Specialist, Marketing and production support staff, over a gross total estimated timeframe of eight months. We understand that work of this scale can be very fluid, and feel that for the work required, our total hours are appropriate, based upon our recent level of experience and related deliverables.

We understand the value of our established relationship and the importance of providing quality, detailed information for such an important District endeavor. We respect the value of the time of the Board, the Facilities Committee(s), and the Community. By the time this exercise is complete, there will be thousands of personal hours dedicated to this collective effort. Doing it right the first time is important for all involved.



In an effort to cost share a portion of this work, the design team proposes a lump-sum fee of \$39,200 for the Scope of Work and Schedule as outlined. Once a final schedule is determined, we will confirm invoicing with you as work progresses.

Reimbursable expenses typically include postage, printing cost for large format plots/prints or reproduction of your existing project documents, in-house printing of marketing materials, photography, and mileage at the government standard rate. For this scope of work for a local district, we anticipate minimal reimbursable expenses in the range of \$500 - \$700. An itemized breakdown of these associated costs will be reviewed with you prior to incurring these costs.

Exclusions / Additional Services

The following services noted below are excluded in fees above, and would be an additional cost to the owner if required:

- Detailed assessment/evaluations of existing building systems
- Confirming Existence of Hazardous Material
- Site Survey(s)
- Design work beyond Conceptual Design Concepts as noted above.
- Printing of materials for public distribution (flyers, mailers, hand-outs, etc.)

Should you have any questions, please do not hesitate to contact me. We are very excited about the opportunity to work with you and the Linn Mar Community School District as you move towards shaping the future of education in our community.

If our proposal is in order and acceptable, please sign where noted below and return a copy to our office for our record.

With Kind Regards,

A handwritten signature in blue ink that reads 'Roger B. Worm'.

Roger B. Worm, AIA
Principal

Authorized Signature

Title/Position

Date