

11 November 2019

Ms. Debbie McLaughlin, Director  
Parks & Recreation Department  
City of Upper Arlington  
3600 Tremont Road  
Upper Arlington, OH 43221

Re: Letter of Proposed Agreement for Pre-Design (Feasibility Study) Services  
City of Upper Arlington Community Center  
WA BD No. 2019-408

### **LETTER OF PROPOSED AGREEMENT (LOPA)**

Dear Ms. McLaughlin:

Thanks to you and the entire Selection Committee (composed of members from the City staff and Community Center Feasibility Task Force Facility and Partnerships Subcommittee) for taking the time to interview the Williams Architects' Consulting Team (Williams, PROS and OHM Advisors). We appreciate that the City is interested in entertaining a proposal from our Team and trust that the following will provide clarity to our approach. We are delighted to provide the City of Upper Arlington with this Letter of Proposed Agreement ("LOPA"), outlining our understanding and approach for the Pre-Design (Feasibility Study) Services for the City of Upper Arlington's Community Center.

#### **CONSULTING TEAM MEMBERS**

The following team members are the Consulting Team's critical Management Team; however, the services of many other talented professional and technical staff beyond those noted herein will also be utilized:

Williams Architects / Aquatics (Architect, Public Engagement):

- Tom C. Poulos, AIA / Principal-in-Charge
- Nan T. Weir, AIA / Managing Architect

PROS Consulting (Business Planning, Public Engagement):

- Leon Younger, President / Project Manager
- Philip Parnin, Senior Project Manager / Recreation Needs Analyst

OHM Advisors (Site Land Planning & Landscape Architect, Public Engagement):

- Aaron Domini, Principal

#### **UNDERSTANDING OF PROJECT SCOPE & BUDGET**

Over the past forty years, there have been multiple previous efforts to develop a community recreation center in Upper Arlington. These efforts were not successful due to a lack of public support, as shown by multiple failed tax levies. In the statistically valid survey associated with the 2018 Parks and Recreation Comprehensive Plan, there was considerable public support for an Indoor Recreation / Community Gathering Center that services all ages and segments of the population.

Because our team, which was led by PROS Consulting, worked very closely with the Upper Arlington Parks and Recreation Department to prepare the 2018 Parks and Recreation Comprehensive Plan, we are very familiar with the Comprehensive Plan, the recommendation to conduct a feasibility study, and the need to engage the community throughout the process. We understand the importance of doing the due diligence this feasibility study requires so that the community and its leaders can make informed decisions about the needs, viability, and level of public support for an indoor recreation / community center in Upper Arlington.

We believe it is important to shape the specific process and community engagement touchpoints for your Project such that it is the right fit for Upper Arlington. We propose to provide our services in a 2-step approach whereby the City of Upper Arlington has the option, at the completion of Step 1, to continue on with Step 2 services, or if the public does not support the project, end the Feasibility Study at the completion of Step 1. The following narrative and scope of services to be performed by the Consulting Team shall be completed in accordance with generally accepted standards of the practice and shall include the services and supplies to complete the following tasks:

## **STEP 1 – INITIAL FEASIBILITY STUDY EVALUATION (\$72,500)**



### **Project Kick-Off / Data Collection (\$5,000)**

The Consulting Team facilitates a Project Kick-Off Meeting with representatives from City staff, CCFTF, and other stakeholders. During this meeting we will identify the roles and responsibilities of the Project Team (including involvement of staff and each of the subcommittees), review all data collected with respect to the Project and meet with key staff to gather additional input. We will discuss:

- Expectations/Tasks - We will discuss and define overall expectations and necessary tasks and responsibilities. A detailed work plan (including initial goals and objectives, as it relates specifically to the task) will be discussed and a project schedule will be developed.
- Evaluate Program and Project Parameters – We will facilitate discussions and evaluate with the City and Community Center Feasibility Task Force (CCFTF) the program requirements and overall project parameters.
- Communiqué / Project Management (10 Meetings) – Confirmation on lines of communication, points of contact, level of involvement by City leaders and staff, partner and other related project management details. As the prime, Williams Architects (Nancy T. Weir) will attend bi-weekly meetings with the Leadership Team (Task Force, Staff & Sub-Committee) for a total of 10 meetings.
- Data Collection – We will request, collect, log and review potential data and information required to facilitate a thorough understanding of the project background.
- Design Criteria - Develop a “Design Statement” and establish the Project’s design criteria, as they relate to the Project’s goals and objectives. We gather all information available, as well as infrastructure, due diligence, surveys, land use preservation, surveys, photographs, additional existing feasibility studies, master plans, drawings, zoning information, soil borings, etc. We will review the City of Upper Arlington’s data and related materials, including the 2018 Parks and Recreation Comprehensive Plan to re-familiarize ourselves with the design intent and scope of work for the Upper Arlington Community Center. Utilizing this information, we build a comprehensive database of our findings including a project flow chart outlining the milestones, schedule and key tasks to be completed.
- Calibrate and Finalize Engagement Plan – Working with the CCFTF Community Engagement Subcommittee, we will review and finalize the public engagement plan. A master schedule will be created, showing communication protocols and framework. We will discuss and identify participants for the focus group and planning for the community meetings.

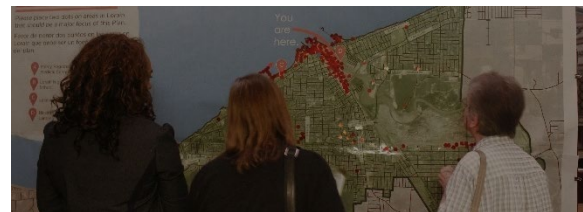
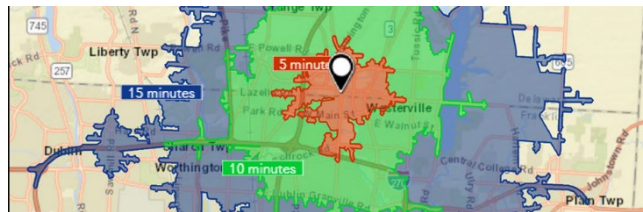


### **Stakeholder Input (\$4,000)**

The foundation of all projects should be built upon an inclusive input process. This project's input process will be based on qualitative data gleaned from leadership and stakeholder meetings. The Consulting Team will utilize contacts and relationships of the City to identify key stakeholders and leaders to gather input in order to gain consensus on key development priorities and operational strategies and programs.

The Consulting Team will perform up to 15 stakeholder interviews with key stakeholders and up to five (5) staff interviews to evaluate the vision for the facility; these interviews will occur within the first 15 days of the project. The community values, strengths and challenges potentially facing the facility, trends and existing level of services provided will also be evaluated during this time. It is important to have one-on-one interviews and these stakeholders and staff to ascertain candid input. These interviews will identify vision, values and key issues and provide insight into facility and program needs, operational issues, and opportunities. These interviews may include elected officials, educational groups, advocacy groups, local businesses, public / private program providers, sports groups, youth, seniors, and other potential partners.

We will meet with other local government entities to understand their past challenges, what led to their success, and what are their upcoming needs / desires such that we can navigate the waters and plan accordingly. Early communication is key. Organizations will include, but not be limited to: School Districts, Library Districts, City municipal needs, Township, Metro Parks, etc. such that we can anticipate how their needs will impact the community tax. The Consulting Team will also interview up to five (5) local area peer agencies that have completed community centers to discuss their successes / failures.



### **Competitor Analysis (\$4,500)**

- **Demographic Analysis (Included)**

The Consulting Team will review with the CCFTF the demographic information from the 2018 Completed Master Plan (prepared by PROS) and utilize this information as the baseline for the feasibility study.

- **Service Provider Analysis (\$3,000)**

The Consulting Team will analyze all major direct and indirect service providers that are associated with indoor community centers within the 15-mile radius of Upper Arlington. Direct and indirect service providers will be based on typical services/programs administered in like facilities. This data will be utilized to compare against the activities and programs identified in the Market Definition. An inventory of comparable facilities will be performed on a local basis as well to attempt to quantify market share. Also, the comparable facilities will include local private studios. An analysis of competition will include location, service offering, pricing, and amenities offered.

- **Market Definition (\$1,500)**

The Consulting Team will confirm the size of the market by age segment and race/ethnicity for the study area. Detailed demographic analysis will be compared to potential recreational activities to estimate potential participation per national and local trends, as documented in the Sports & Fitness Industry Association's (SFIA) *2018 Study of Sports, Fitness and Leisure Participation*. The market research data, as well as ESRI Local Market Potential. This will help to determine the size of the activity market by age segment and frequency rates that can be applied to the facility. These figures will serve as the basis for participation and revenue projections of the Community Center.



### **Public Participation – Round 1 (\$31,500)**

We propose the following public participation approach. This approach will be confirmed with the City of Upper Arlington to ensure it meets with City's satisfaction. Furthermore, in the spirit of shared services and in an effort to reduce the overall project cost and promote collaboration, we propose online website management, social media, administration of an online survey and crowd sourcing to be completed by the client team.

- **Focus Groups - Round 1 (\$9,500)**

A series of up to six focus groups will be conducted. The purpose of the focus groups is to evaluate the need, potential program, and location for a community center in the Upper Arlington. Each topic will be evaluated in the focus groups. It is anticipated the output of these discussions will specifically inform the development of the community survey, as well as final determination on the purpose, need, program, and location of a facility in the community. Specific focus groups may include but are not limited to:

- a. Children / Families;
- b. Youth/active sport group;
- c. Arts and culture;
- d. Seniors; and
- e. Strategic partners/private sector
- f. Adult Fitness / Wellness

- **Community Meetings – Round 1 (2 Meetings) (\$12,000)**

We believe as part of this process it will be important to host large open community meetings. As part of these meetings, the Consultant Team will design a workshop where participants will be engaged in small groups working to address and provide feedback on three key questions.

- a. What is the overall level of support for a community center and why?
- b. How would you use a community center in the future?
- c. Evaluation of future locations for a community center?

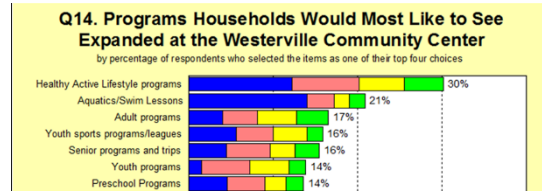
- **Community Pop-Ups (2 Pop-Ups) (\$5,500)**

Similar to the community meeting the consultant team will conduct two community pop-up events to gather additional feedback. This is a tool that members of the consultant team have had success with in the past. A simpler version of the community meeting activities will be conducted at the pop-up events. The consulting team will provide the Task Force with pop-up training and a kit in order for the Task Force to conduct additional pop-up events.

- **Youth Focused Engagement (\$4,500)**

We believe the youth of Upper Arlington are key stakeholders when understanding the need for, and development of a program the future community center. Our team will take the extra step to specifically engage the youth as part of the planning process. This will be a two-step process. The first will be conducting a youth specific focus group(s) at the middle school or high school level. The second will be a youth workbook. The workbook will be geared toward students K-6. The idea is to gain interest and support from youth and families as part of this effort.





**Survey (Statistically Valid and Online) (Statistically Valid - \$15,000; Online by Client Team or see Contingent Optional Additional Services)**

Statistically-Valid Needs Analysis Survey – The Consulting Team will perform a random, scientifically valid community-wide household survey to quantify knowledge, need, unmet need, priorities and support for the community center expansion. The survey will be administered by phone or by a combination of a mail/phone survey and will have a minimum sample size of approximately 400 completed surveys at a 95% level of confidence and a confidence interval of +/- 5%. Prior to the survey being administered, it will be reviewed by the City staff.

We will develop and launch a community survey. The survey will be informed by the results of the previous public engagement activities and developed and refined in partnership with the Community Engagement Subcommittee. It is anticipated the survey will address the three key questions explored during the community events and focus groups including:

- a. What is the need?
- b. What is the preferred program?
- c. What is the best location?
- d. Site travel?
- e. Potential Partners?

Other questions will also be addressed that will build a complete data set of information from which to make informed decisions regarding the community center.



Core Program Component/Space Type	Community Center Area (SF)
Athletics	13,600
Aquatics	14,000
Wellness	6,000
Multi-Use / General Program	4,200
Facility Administration	2,500
Common Space	14,500
Utility Space	2,700
Partner (Health, Library, School)	10,000

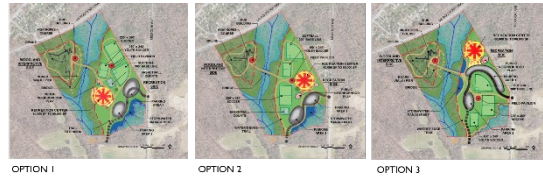
**Visioning and Program (\$10,500)**

Utilizing the community input, demographic analysis, service provider analysis, and market definition, we will commence with our creative visioning process and identify the recommended core programs for the facility. This will include key activities and programs for participants, as well as the potential size of the core program and market positioning.

Core program identification could include: Recreation, Sports, Therapy, Enrichment, Fitness and Wellness, Family Activities, Arts, Education, Aquatics, Active Adults, Boomers and Seniors.

With the information obtained in the Kick-Off Meeting, we will prepare a bullet-point building program summary for use in preparing the Concept Plan options. We will meet with the representatives of the Project to review program needs and establish the same as required. We shall prepare a bullet-point summary with like photo examples which describe the anticipated scope of work, as it relates to the facilities program elements / areas.

Item No.	1	2	3	4	5	6	7	8	9	10	11	12	13	14	15
1. Project Description	1.1. Project Description	1.2. Project Description	1.3. Project Description	1.4. Project Description	1.5. Project Description	1.6. Project Description	1.7. Project Description	1.8. Project Description	1.9. Project Description	1.10. Project Description	1.11. Project Description	1.12. Project Description	1.13. Project Description	1.14. Project Description	1.15. Project Description
2. Client Information	2.1. Client Information	2.2. Client Information	2.3. Client Information	2.4. Client Information	2.5. Client Information	2.6. Client Information	2.7. Client Information	2.8. Client Information	2.9. Client Information	2.10. Client Information	2.11. Client Information	2.12. Client Information	2.13. Client Information	2.14. Client Information	2.15. Client Information
3. Site Information	3.1. Site Information	3.2. Site Information	3.3. Site Information	3.4. Site Information	3.5. Site Information	3.6. Site Information	3.7. Site Information	3.8. Site Information	3.9. Site Information	3.10. Site Information	3.11. Site Information	3.12. Site Information	3.13. Site Information	3.14. Site Information	3.15. Site Information
4. Program Information	4.1. Program Information	4.2. Program Information	4.3. Program Information	4.4. Program Information	4.5. Program Information	4.6. Program Information	4.7. Program Information	4.8. Program Information	4.9. Program Information	4.10. Program Information	4.11. Program Information	4.12. Program Information	4.13. Program Information	4.14. Program Information	4.15. Program Information
5. Financial Information	5.1. Financial Information	5.2. Financial Information	5.3. Financial Information	5.4. Financial Information	5.5. Financial Information	5.6. Financial Information	5.7. Financial Information	5.8. Financial Information	5.9. Financial Information	5.10. Financial Information	5.11. Financial Information	5.12. Financial Information	5.13. Financial Information	5.14. Financial Information	5.15. Financial Information
6. Other Information	6.1. Other Information	6.2. Other Information	6.3. Other Information	6.4. Other Information	6.5. Other Information	6.6. Other Information	6.7. Other Information	6.8. Other Information	6.9. Other Information	6.10. Other Information	6.11. Other Information	6.12. Other Information	6.13. Other Information	6.14. Other Information	6.15. Other Information



**Site Identification and Analysis (\$1,000)**

During this phase we will work with the client to identify potential sites for the community center. This will be based on analysis by both the Consulting Team and input from the advisory committee, as well as city staff and leadership.

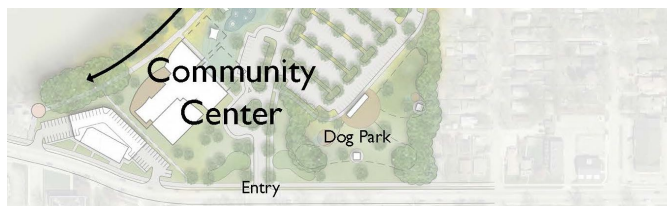


**Partnership Identification (\$1,000)**

We will work with the staff to identify and interview potential partners that could help develop the Community Center facility or provide programs in the facilities to reduce the city’s capital costs. Interviews will include up to 10 potential capital or funding partners.

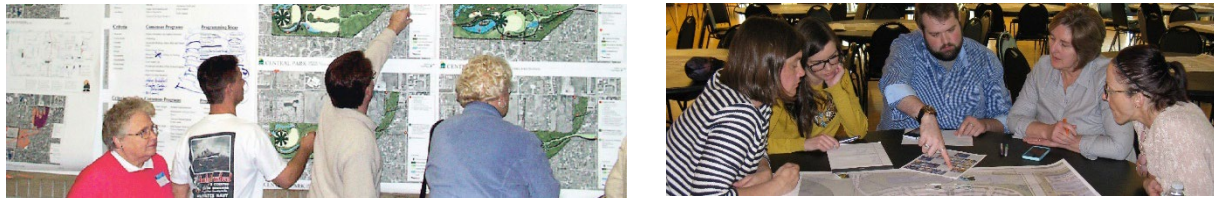
**STEP 2 – DEVELOPMENT OF FEASIBILITY STUDY SERVICES (\$72,500)**

The Consulting Team will work to translate the market and corresponding program and market assessment into a conceptual facility design including spatial relationship. This task will be performed in conjunction with the program and operations tasks. This collaborative planning process where program and space are jointly formulated provides a representative model where the interrelationship of program and space and associated choices and consequences can be directly illustrated.



**Site Identification and Analysis- Round 2 (\$4,000)**

Criteria & Preferred Site(s) - The preferred site(s) will be evaluated and narrowed down to select up to two to three locations. We will perform a site analysis of each site and identify the potential carrying capacity of the site based on a general program and building template for the community center.



**Program Refinement & Space Allocation Design Options (\$9,500)**

Utilizing the public engagement and market analysis, the Consulting Team will identify the key activities and programs for participants. Goals and budget for the project will be shared and reviewed, and lead to a succinct “Program Statement” that speaks to and addresses the overall program goals for this Project. This will serve as our program mission statement. This is reviewed with leadership staff and potential Partner representatives and any overall changes are made. Meetings with stakeholders will take place to gather input. The Consulting Team will prepare idea board(s) to help stakeholders envision potential spaces and choices. The result will be a list of goals for each core program feature.

We will work with the City of Upper Arlington to determine staff (current and projected), storage needs, meeting needs, other special space needs, etc. This data is then analyzed along with high-level staff to remove unnecessary items and to ensure there are no overlaps or gaps between the surveys. Then we use that information to produce a Space Program that lists the spaces necessary to meet the functional needs. Additionally, we will review all support spaces for the facility in a similar fashion and synthesize the data into a comprehensive Building Space Program.

The refined Space Program for the Community Center will be prepared and shared with the Community Center Feasibility Task Force and other stakeholders as determined, and any overall changes will be made.

The aforementioned completed Space Program will provide a summary of areas that each program space requires including an estimate of the order of magnitude of cost for the various design options. Based on the Program Summary the Consulting Team shall develop 2 – 3 Space Allocation design options for the preferred site, depicting the organization and adjacency of spaces for the proposed facility, for review and selection of a singular preferred solution by the City of Upper Arlington.



**Concept Development (\$23,000)**

Our Consulting Team will utilize the Space Allocation Program and the preferred Space Allocation Plan, which describe the facility’s program elements, areas, and functional / spatial relationships, to prepare a final conceptual plan, with optional program design additions, including floor plan(s), site plan(s), building elevations, illustrative rendering(s), 3-D digital model(s), drawn to scale, and indicating location, size, and proposed amenities to best meet the recreation and wellness needs of the City of Upper Arlington. Refer to Contingent Optional Additional Services for inclusion of Municipal Service Building planning, as a result of selection if the Municipal Service site location. Furthermore, see Contingent Optional Additional Services for inclusion of the development of a second concept on an additional site, as well as the development of Animations.

**Capital Cost Development (\$3,000)**

The Consulting Team will provide a capital cost estimate which will include a breakdown by features and amenities for the preferred solution.



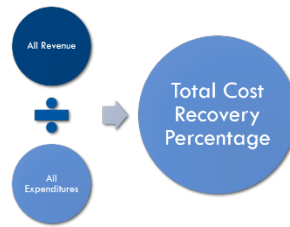


**Public Participation – Round 2 (\$16,000)**

- **Focus Groups Round 2 (\$5,000)**  
The consultant team will conduct a second round of focus group meetings after the development of a draft program and concept plan for the community center. The purpose of these meetings will be to get strategic insight into the draft program and center design/layout. Comments will be received and integrated into the final draft program and center concept(s).
- **Electronic Survey - Round 2 (not statistically valid) (Included)**  
We believe conducting a second online community survey in the second phase of planning is a low-cost engagement strategy that will continue to build trust and insight into the development of the project. Recent experience from our team indicates this tool can develop 2,000 – 3,000 responses in a short amount of time. The survey questions and desired outcome will mirror the questions and outcomes of the focus groups.
- **Community Event 2 (up to 2 meetings) (\$11,000)**  
At this community event the consultant team will conduct a second round of public meetings. The purpose of the meetings will be to reveal and test the draft program and concept plans for the community center at the preferred location (preferred location outcome of Phase I). Unlike the first round of community meetings this meeting will be designed as an open house, with a formal presentation at the beginning of the meeting.

**Pro Forma Revenues & Expenditures**  
Fairbank Community Center  
BASELINE: REVENUES AND EXPENDITURES

Revenues	1st Year	2nd Year	3rd Year	4th Year	5th Year	6th Year
Passes	\$807,852.00	\$832,087.56	\$857,050.19	\$882,761.69	\$909,244.54	\$936,521.88
Administration	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
Building Maintenance	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
Recreation Programs	\$890,741.00	\$917,463.23	\$944,987.13	\$973,336.74	\$1,002,536.84	\$1,032,612.95
Fitness	\$137,488.00	\$141,812.64	\$145,861.02	\$150,216.85	\$154,743.96	\$159,386.27
Natorium	\$616,823.32	\$635,328.02	\$654,387.86	\$674,019.49	\$694,240.08	\$715,067.28
Gymnasium	\$119,850.00	\$123,445.50	\$127,148.87	\$130,963.33	\$134,892.23	\$138,939.00
Parties and Rentals	\$228,894.00	\$235,245.82	\$242,303.19	\$249,572.29	\$257,059.46	\$264,771.24
Seniors	\$150,770.00	\$155,293.10	\$159,951.89	\$164,750.45	\$169,692.96	\$174,783.75
General Services	\$24,500.00	\$25,235.00	\$25,992.05	\$26,771.81	\$27,574.97	\$28,402.21
<b>Total</b>	<b>\$2,976,418.32</b>	<b>\$3,065,710.87</b>	<b>\$3,157,682.19</b>	<b>\$3,252,412.06</b>	<b>\$3,349,985.04</b>	<b>\$3,450,484.59</b>



**Business Plan / Proforma (\$13,500)**

- **Operational Standards (\$2,000)**  
The Consulting Team will establish operational standards and costs for the Community Center based on full operations. This will include hours of operation, maintenance standards, staffing levels needed, technology requirements and customer service requirements based on established and agreed upon outcomes. Where appropriate, personnel standards as dictated by all state and/or local codes and ordinances will also be determined based on the design and program of the facility. This task will require a workshop with the CCFT Finance Subcommittee, key management and staff.
- **Partnership Identification and Funding Strategy (\$4,000)**  
The Consulting Team will evaluate existing partnerships and potential new contributing partnerships for the Community Center to gain an understanding of the impact of program specific partnering; ultimately determining if the shared risk associated with partnering eases the fiscal burden of service delivery while continuing to provide a benefit to the community. This will include identification of potential partners by specific activity, funding parameters, and agreement guidelines to support formal agreements. The Consulting Team has extensive experience in multiple partner – public, private, and non-profit – operational scenarios. Management alternatives will be developed to guide decision-making by the project team.



- **Financial and Funding Plan/Pro-Forma (\$7,500)**

Based on the program, operations, and conceptual plan for the facility, the Consulting Team will develop a detailed financial and funding plan illustrating pricing strategy for each of the programs and services. The detail financial plan would include a space utilization summary based on detailed line item projections and detailed participation by program area. Financial modeling will be completed in Microsoft Excel; a fully functional version of the electronic model will be provided to the management group for future use as a budgeting and planning tool. The electronic financial model, fully linked and functional with the ability to project and model dynamic scenarios, will include:

- Expenditure detail: Detailed staffing by space/program area; contractual costs, including but not limited to, utilities, maintenance and repair, insurance, office/license/dues, advertising and promotion; Commodity costs for program area and general facility requirements; Contract instructor costs; and a capital maintenance plan.
- Revenue and participation detail: General admission by month of year, by participant category and price point (youth, adult, weekday, weekend, etc.); Program/class participation by session/meetings, by participant category; Rental by space/program area by price point.

Pricing strategies would be based on a ten (10) step process which highlights the level of exclusivity received by the participant and the value of experience provided. The detailed financial and funding plan will be included as a deliverable to provide management and staff the ability to affectively plan and budget for future years. In addition to the line item detail and summary schedules for revenues, expenditures, and debt service, this model will provide a five-year pro forma and cash flow for budgetary purposes.

The Consulting Team will develop funding options to build and operate the community center as part of this phase.



- **Final Report / Presentation (\$3,500)**

The Consulting Team will present the draft Community Center *Feasibility Study* findings and recommendations over a one (1) day period for comment and review. Presentations will be made to the Community Center Feasibility Task Force project team and if requested, to City Council and the Public.

**SCHEDULE MANAGEMENT & PROPOSED PROJECT SCHEDULE**

Our procedure for maintaining project schedules includes defining a very specific step-by-step process with the Owner at the beginning of the Project. With this ongoing series of deadlines to meet, it has allowed us to maintain excellent results in achieving our project deadlines. We take great effort to carefully plan out all the meetings, work tasks and project milestones for a Project. We do this because it has greatly enhanced our ability to keep our projects moving forward with no surprises to our clients. We will work with the City to develop a Project Schedule that meets the City’s goals and objectives.

Project Milestones:

- Step 1 – Initial Feasibility Study Evaluation Dec. 2019 – Mar. 2020

Week:	Month 1				Month 2				Month 3				Month 4			
	1	2	3	4	1	2	3	4	1	2	3	4	1	2	3	4
<b>Community Center Feasibility Study</b>																
<b>Step 1 - Initial Feasibility Study Evaluation (4 Months)</b>																
Project Kick-Off /Data Collection	█	█														
Stakeholder Input		█	█													
Competitor Analysis			█	█												
Site Identification and Analysis							█	█		█						
Public Participation - Round 1																
Survey																
Visioning and Program																
Partnership Identification																

Key Meeting Dates █

Task Technical Work █

- Step 2 – Final Feasibility Study Development Apr. 2020 – Aug. 2020

Week:	Month 1				Month 2				Month 3				Month 4				Month 5			
	1	2	3	4	1	2	3	4	1	2	3	4	1	2	3	4	1	2	3	4
<b>Community Center Feasibility Study</b>																				
<b>Step 2 - Development of Feasibility Study Services (4 Months)</b>																				
Space Allocation																				
Concept Development																				
Capital Cost Development																				
Public Participation - Round 2																				
Business Plan / Proforma																				
Presentation																				
Final Report																				

Key Meeting Dates █

Task Technical Work █

### TOTAL PROFESSIONAL PROJECT SERVICE FEES

The compensation to the Consulting Team by the City shall be paid on a fee basis, as described below, for the Scope of Services performed in accordance with the enclosed compensation breakdown. The Consulting Team shall bill the City on a monthly basis for the percentage of services / work performed for the previous month's time.

We respectfully propose our Professional Services fees as follows:

#### Step 1 – Initial Feasibility Study Evaluation \$ 72,500.00

A Fixed Fee of Seventy-Two Thousand Five Hundred Dollars (\$72,500.00) plus Reimbursables Expenses.

Project Kick-Off / Data Collection	\$ 5,000.00
Stakeholder Input	\$ 4,000.00
Competitor Analysis	\$ 4,500.00
Public Participation – Round 1	\$31,500.00
Survey (Statistically Valid and Online)	\$15,000.00 Statistically Valid; Online by Client Team or see Additional Services
Visioning and Program	\$10,500.00
Site Identification and Analysis – Round 1	\$ 1,000.00
Partnership Identification	\$ 1,000.00

#### Step 2 – Final Feasibility Study Development \$ 72,500.00

A Fixed Fee of Seventy-Two Thousand Five Hundred Dollars (\$72,500.00) plus Reimbursables Expenses.

Site Identification and Analysis – Round 2	\$ 4,000.00
Space Allocation	\$ 9,500.00
Concept Development	\$23,000.00
Capital Cost Development	\$ 3,000.00
Public Participation – Round 2	\$16,000.00
Business Plan / Proforma	\$13,500.00
Final Report / Presentation	\$ 3,500.00

#### Grand Total – Step 1 and Step 2 \$ 145,000.00

### REIMBURSABLE EXPENSES

In addition to our professional services, we shall also invoice the client for our Project related Reimbursable Expenses at a 1.15 multiplier. Project related Reimbursable Expenses include such items as travel, vehicle mileage, tolls, printing, copies, photography, renderings / slides, phones & fax, postage / messenger / overnight courier, direct miscellaneous Project supplies, etc.

### CONTINGENT OPTIONAL ADDITIONAL SERVICES

- Additional Public Participation  
To reduce the overall project cost and promote collaboration, we propose online website management, social media, administration of an online survey and crowd sourcing to be completed by the client. If completed by the Consulting Team, this effort will be provided at an added cost of **Eight Thousand Dollars (\$8,000.)**
- Additional Concept Development
  - Planning, design, and concept development as a result of selection of an alternative site location. This effort will be provided at an added cost of **Twelve Thousand Dollars (\$12,000.)**
  - Full development of a second concept on an additional site. This effort will be provided at an added cost of **Twenty Thousand Dollars (\$20,000.)**
  - Animation of a preferred concept. This effort will be provided at an added cost of **Eight Thousand Dollars (\$8,000) per concept.**



Furthermore, professional services excluded from and not specifically noted within this LOPA can be provided on an hourly, or mutually agreed upon fixed fee basis by the City and Consulting Team. Upon the City's request and approval of the same, with scope and fee as established and as mutually agreed upon between the City and Consulting Team, we will document the City's desired Contingent Optional Additional Services.

**CLOSING**

If you are in agreement with the terms and conditions of this Letter of Proposed Agreement (LOPA), please sign / date below, and return a copy to our office. Upon receipt of this LOPA we will attach the same to a mutually agreed upon Prime Agreement. We are ready to start our services immediately. It is understood that the general terms contained within this LOPA are as per the Architect's Standard of Care.

Thank you again for this wonderful opportunity to offer our Professional Services to the City of Upper Arlington. If you have other questions or comments, please do not hesitate to contact me at your earliest convenience.

Cordially,



Tom C. Poulos, AIA  
Vice President / Managing Principal

CC: Nancy T. Weir / Williams Architects  
Sonja L. Sporleder / Williams Architects

Attachment: Project Team Collaboration

**APPROVED:**

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Printed Name and Title – City of Upper Arlington - Authorized Representative

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Signature  
City of Upper Arlington Authorized Representative

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Date

