



Residence @ 609 W. Olin Ave

Proposal for OpeningDesign's Architecture & Engineering Services

Phases & Scope of Services

- **Phase 1 - Programming**
 - Perform field measurements/drawings of existing site conditions
 - Conduct building code and zoning analysis to determine the extent of what is possible on the lot.
- **Phase 2 - Schematic Design**
 - Continue researching applicable building/zoning code
 - We will take the agreed-on list of requirements and provide a maximum of (2) site design layout options. These design options will address varying approaches in the following criteria.
 - Functional relationship of the various spaces
 - Features on site
 - Aesthetics leanings
 - Structural considerations
 - Mechanical considerations
 - Plumbing considerations
 - Major equipment locations
 - Code restrictions/requirements
 - Concepts will be presented in the following formats

- 3-dimensional renderings/sketches
 - Examples of what to expect...
 - <https://www.youtube.com/watch?v=GLbXbQvYTSY>
 - <https://www.youtube.com/watch?v=eKLwbRPwYzE>
 - <https://www.youtube.com/watch?v=bS4kqCsIHWk>
 - Site plan
 - Floor plans
 - Elevations *(We will provide elevations of the home, but due to the time constraints of the Council Meeting, the elevation drawings might not be as thoroughly refined. As I mentioned, we can dial into these in more detail after the PUD has been granted)*
 - After reviewing the (2) design options with you, we will refine one design for the scheduled Town of Dunn Plan Commission Meeting.
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- **Phase 3 - Design Development**

- Here we will dial into one design by either refining one of the proposed designs and/or combining the desired aspects of the other design(s) proposed.
 - Developed deliverables will include:
 - Floor plans
 - Site plan
 - Elevations
 - Sections
 - Select details
 - Propose, select, and refine materials and finish options
 - Continue to coordinate drawings with the various subs/engineering disciplines
 - Develop rough square foot costs
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- **Phase 4 - Construction Documents**

- Will complete the following drawings for permit and construction:
 - Architectural
 - Site plan
 - Floor plans
 - Reflected ceiling plans
 - Lighting layout
 - Exterior elevations
 - Interior elevations
 - Including millwork/casework (large scale details are outside this scope)
 - Building/Wall Sections
 - Large Scale Exterior Details
 - Door/Window/Finish Schedules
 - Structural Plans
 - Construction Specifications, if necessary
 - Continue to coordinate and communicate with various engineering consultants, if necessary.
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- **Phase 5 - Bidding and Contract Negotiation**

- Submit/manage any municipal plan reviews and/or permits.
 - Answer contractor's bid questions, issue clarifications.
 - Modify drawings if required to accommodate budget
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- **Phase 6 - Construction Administration**

- Weekly site visits, assuming a typical construction pace.
 - Respond to RFIs (request for information from general contractor)
 - Review shop (fabrication) drawings and submittals
 - Review GC proposal for substitutions
 - Review change orders
 - Develop punch list
 - If applicable, review application for payments
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Hourly Rates Relative to Workflow

Over the years, OpeningDesign has developed a preferred and unique way of working. Although our website's [about page](#) provides more detail, in a nutshell, most of our projects are [open source](#) and are conducted [out-in-the-open](#).

Simply put, this way of working allows OpeningDesign and our extended team of consultants, to be more efficient—ultimately keeping costs down and bringing more value to our clients. Having said that, we understand some clients, for whatever reason, may have hesitations regarding this approach.

To address your potential concerns, if any, we would like to offer the following (3) workflow and fee options:

- **Approach (A): A Fully Open Approach** where the construction documentation, location, and the names of the parties involved in this contract are known and are shared publicly. All of OpeningDesign's (and their consultant's) newly created documentation/content is [open source](#). That is, will be freely available to any party for future use, assuming the terms such as [Attribution](#) and [ShareAlike](#) are honored.
 - We used this approach for a Sport Complex in Jefferson, WI, the files (CAD/BIM) of which can be found [here](#) and a log of communication that happened between the design team and general contractor, [here](#).
 - **Approach (B): An Anonymous Open Approach** where all newly created documentation is shared publicly, however, the project location and the names of the direct or indirect clients, are kept anonymous. Again, similar to approach (A), all of OpeningDesign's (and their consultant's) newly created digital documentation/content is [open source](#).
 - We used this approach on an office/warehouse facility here in southern Wisconsin, of which the (CAD/BIM) files can be found [here](#).
 - **Approach (C): The Traditional Approach** where all documentation, and clients involved, remains confidential and private. Per industry norm, the Architect and the Architect's consultants are deemed the authors and owners of their respective Instruments of Service, and they retain all common law and statutory rights, including copyright.
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Not-to-Exceed Fee Proposal Options (A, B, or C):

%	Phase	Approach (A)		Approach (B)		Approach (C)		Estimated Duration
		Rough % of Const. Costs	Not-To-Exceed	Rough % of Const. Costs	Not-To-Exceed	Rough % of Const. Costs	Not-To-Exceed	
5.00%	Phase 1: Programming	0.4%	\$1,050	0.4%	\$1,200	0.5%	\$1,350	1.0 wks
20.00%	Phase 2: Schematic Design	1.4%	\$4,200	1.6%	\$4,800	1.8%	\$5,400	4.0 wks
20.00%	Phase 3: Design Development	1.4%	\$4,200	1.6%	\$4,800	1.8%	\$5,400	4.0 wks
30.00%	Phase 4: Construction Documents	2.1%	\$6,300	2.4%	\$7,200	2.7%	\$8,100	6.0 wks
5.00%	Phase 5: Bidding & Contract Negotiation	0.4%	\$1,050	0.4%	\$1,200	0.5%	\$1,350	1.0 wks
20.00%	Phase 6: Construction Administration	1.4%	\$4,200	1.6%	\$4,800	1.8%	\$5,400	n/a
100.00%	All Phases	7.0%	\$21,000	8.0%	\$24,000	9.0%	\$27,000	

Assuming a Construction Cost = \$300,000

Please note, these are not **lump sum** fees, but are instead, **not-to-exceed** fees. If the project costs go down/up, or less/more scope is involved over time, these fee ceilings will adjust relatively.

The **Hourly Rates**, called out below, will apply until this not-to-exceed fee is reached.

By using hourly rates and a not-to-exceed fees based on percentages of construction, we have found this to be a win-win for both parties. The design professionals are given a little more safeguard against potential [scope creep](#) and the client can realize more economical fees if they are able to make decisions quicker and more consistently—moving the design of the project along quicker. In addition, clients are able to adjust, on the fly, what types of services they might or might not need as the project unfolds.

Hourly Rates

-	Approach (A)	Approach (B)	Approach (C)	A Rough Estimated Percentage of Fees
Architecture				
OpeningDesign				
Level 1	\$75/HR	\$85/HR	\$100/HR	65%
Level 2	\$55/HR	\$65/HR	\$75/HR	25%
Structural Engineer Consultant				
Level 1	\$170/HR	\$170/HR	\$170/HR	2%
Level 2	\$125/HR	\$125/HR	\$125/HR	3%
TOTAL				100%

Additionally, the following list of consultants may be required during this project. Their associated billing rates would be accounted for in the overall not-to-exceed fee.

- Specification Writer
- Door Hardware Consultant
- Lighting Consultant

*Consultant expenses will include an **additional 10%** to cover in-house administration, handling, financing, and insurance costs.*

The Determination of the Not-to-Exceed Fee

For your reference and peace of mind, please review the following document as to what the standard practices are for establishing design fees in the construction/architecture industry.

- [A Guide to Determining Appropriate Fees for the Services of an Architect Consultants.](#)
- <http://www.lifeofanarchitect.com/architectural-fees-part-1/>
- <http://www.lifeofanarchitect.com/architectural-fees-part-two/>
- <http://www.lifeofanarchitect.com/architectural-fees-for-residential-projects/>

We are confident that through our unique and open way of working and our strong band of collaborators and consultants, that that we will meet and exceed the industry standard of care.

Reimbursable expenses include:

- Transportation in connection with the project for travel authorized by the client (transportation, lodging and meals)
- Communication and shipping costs (long distance charges, courier, postage, dedicated web hosting, etc.)
- Reproduction costs for plans, sketches, drawings, graphic representations and other documents
- Renderings, models, prints of computer-generated drawings, mock-ups specifically requested by the client

- Certification and documentation costs for third party certification such as LEED®
- Fees, levies, duties or taxes for permits, licences, or approvals from authorities having jurisdiction
- Additional insurance coverage or limits, including additional professional liability insurance requested by the client in excess of that normally carried by the architect and the architect's consultants
- Direct expenses from additional consultants not specifically outlined in this proposal

Reimbursable expenses include an additional 10% to cover in-house administration, handling, and financing.

Services *not* included in Proposal

Although we can provide the following services, we are assuming they will either not be necessary, or will be provided by outside parties.

- Land Surveying
 - Civil Engineering
 - Landscape Design
 - Detailed Cost Estimation
 - HVAC/Mechanical Design
 - Plumbing Design
 - Electrical Design
 - Low Voltage Design
 - Audio/Visual Design
 - Fire Alarm & Life Safety
 - Security
 - Furniture, Fixtures & Equipment (FF&E) services
 - Acoustical Engineering Services
 - Hyper-Realistic Renderings
 - Geotechnical Engineering
 - Environmental Studies and Reports
 - Legal Survey
 - Closeout Record Documents
 - LEED Design
 - Environmental Studies
 - Commissioning Services
 - Moving Coordination
 - Post-occupancy Evaluation/Studies
 - Maintenance and Operational Programming
 - Building Maintenance Manuals
 - Post-occupancy Evaluation
 - Extensive decorative finish studies
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Boilerplate

- OpeningDesign will deliver invoices on a monthly basis based on scope complete, with payment due within 30 days of receipt. Invoices overdue past (60) days will be interpreted as an order to stop work on the project.
 - This proposal is valid for 90 days.
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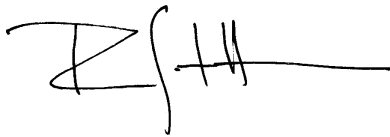
I sincerely appreciate the opportunity to provide you with this proposal and look forward to the potential of a fruitful collaboration in the future.

If we have included a service, with in this proposal, that is not necessary and/or one that is missing altogether, please let us know.

If the terms of this proposal are acceptable please sign in the space offered below.

Finally, please don't hesitate to contact me should you have any questions or require additional information.

Kind Regards,



Ryan Schultz
[OpeningDesign](#)
773.425.6456

Authorized by:

- Please indicated preferred Fee Proposal Option (**A**, **B**, or **C**):

- Signature

- Title

- Date

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