

DePula Residence

1304 Baskerville Ave
Monona, WI 53716

Proposal for OpeningDesign's Architecture & Engineering Services

Hi Nicole/Patrick, Was great meeting up the other day. Thanks for the chat and the tour of your home! I'm excited to have the potential opportunity to help you on your home renovation.

Although a more nuanced list of requirements will undoubtedly unfold as the project evolves, on a high-level, I understand that the project will include the following renovated and/or new spaces...

- Master suite
 - Preferably on the 1st floor
 - Adjoining bathroom
 - Walk-in closet?
- (2) bedrooms for the kids
 - Adjacent bathroom
- Entertaining area
 - Kitchen open to Living Room
 - Dining table
 - Island

- Living Room open to Kitchen
 - Garage
 - 2 cars ideal, but (1) will work if site restrictions are an issue.
 - Might have to get a variance through city of Monona
 - An open garage port was of interest.
 - Basement to remain as is, most likely
 - Construction Budget is \$150,000
 - There was also interest in conducting a real estate assessment to determine the exact renovation scope that would be the most marketable within the area.
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Phases & Scope of Services

- **Phase 1 - Programming**

(approximate duration/fee: 0.5 weeks / 5%)

- Perform field measurements/drawings of existing site conditions
- Conduct building code and zoning analysis & summary
 - Investigate site variance for garage
- Work with realtor to conduct real estate assessment of projected renovation.

- **Phase 2 - Schematic Design**

(approximate duration/fee: 1 weeks / 10%)

- At the beginning of this phase, we will take the agreed-on list of requirements and provide a maximum of (2) design options. These design options will address varying approaches in the following criteria.
 - Functional relationship of the various spaces
 - 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>

- Floor Plans
- Elevations
- Sections

- Continue researching applicable building code
- If necessary, start coordinating and eliciting feedback from the various engineering disciplines
- Develop rough square foot costs

- **Phase 3 - Design Development**

(approximate duration/fee: 2 weeks / 25%)

- 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

- **Phase 4 - Construction Documents**

(approximate duration/fee: 3 weeks / 35%)

- Will complete the following drawings for permit and construction:
 - Architectural
 - Demolitions Plans
 - Floor Plans
 - Reflected Ceiling Plans
 - Lighting Layout
 - Interior Elevations
 - Including Millwork/Casework
 - Details
 - Door/Window/Finish Schedules
 - Structural Plans
 - Construction Specifications, if necessary

- Continue to coordinate and communicate with various engineering consultants, if necessary.
 - **Phase 5 - Bidding and Contract Negotiation**
(approximate duration/fee: 1 week / 5%)
 - Submit/manage any municipal plan reviews and/or permits.
 - Answer contractor's bid questions, issue clarifications.
 - **Phase 6 - Construction Administration**
(approximate duration/fee: NA / 20%)
 - 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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Fee & Workflow Proposal

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 us 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 newly created digital 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.
- **Approach (B): An Anonymous Open Approach** where all newly created documentation is shared publicly, however, the location and the names of the parties

involved are kept anonymous. Again, similar to approach (A), all newly created digital documentation/content is [open source](#).

- **Approach (C): The Traditional Approach** where all documentation and parties involved remain confidential and private.

- Please note, no matter which approach (A, B, or C) is used above...
 - Any documentation from parties outside this contract, and/or shared with OpeningDesign **prior** to the signing of this contract, **WILL NOT** be shared publicly.
 - Any prior emails, or any emails between you, OpeningDesign, or any other parties during the duration of the project, **WILL NOT** be shared publicly.
 - Also, we will not make public anything that you explicitly indicates should be kept private.

Not-to-Exceed Fee Proposal Options (A, B, or C):

%	Phase	Approach (A)		Approach (B)		Approach (C)	
		% Const. Costs	Not-To-Exceed	% Const. Costs	Not-To-Exceed	% Const. Costs	Not-To-Exceed
5.00%	Phase 1: Programming	0.4%	\$563	0.5%	\$675	0.5%	\$788
10.00%	Phase 2: Schematic Design	0.8%	\$1,125	0.9%	\$1,350	1.1%	\$1,575
25.00%	Phase 3: Design Development	1.9%	\$2,813	2.3%	\$3,375	2.6%	\$3,938
35.00%	Phase 4: Construction	2.6%	\$3,938	3.2%	\$4,725	3.7%	\$5,513

Documents							
5.00%	Phase 5: Bidding & Contract Negotiation	0.4%	\$563	0.5%	\$675	0.5%	\$788
20.00%	Phase 6: Construction Administration	1.5%	\$2,250	1.8%	\$2,700	2.1%	\$3,150
100.00%	All Phases	7.5%	\$11,250	9.0%	\$13,500	10.5%	\$15,750

Assuming a Construction Cost = \$150,000

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 (which are well below what we see currently in the market), 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.

Hourly Rates

-	Approach (A)	Approach (B)	Approach (C)	A Rough Estimated Percentage of Fees
Architecture OpeningDesign				
Level 1	\$70/HR	\$80/HR	\$100/HR	65%
Level 2	\$55/HR	\$65/HR	\$75/HR	25%
Structural Engineer Consultant Ntrive				
Level 1	\$170/HR	\$170/HR	\$170/HR	2%
Level 3	\$125/HR	\$125/HR	\$125/HR	3%
Level 4	\$100/HR	\$100/HR	\$100/HR	3%
Level 6	\$85/HR	\$85/HR	\$85/HR	2%
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.](#)

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 a 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.

- Detailed Construction Costs

- HVAC/Mechanical Design
 - Plumbing Design
 - Electrical Design
 - Fire Alarm & Life Safety
 - Fire Protection
 - Security
 - Acoustical Engineering Services
 - Furniture, Fixtures & Equipment (FF&E) services
 - Hyper-Realistic Renderings
 - Civil Engineering
 - Geotechnical Engineering
 - Land Surveying
 - Landscape Design
 - Environmental Studies and Reports
 - Legal Survey
 - Signage Design/Layout
 - Closeout Record Documents
 - LEED Design
 - Environmental Studies
 - Commissioning Services
 - 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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We ([OpeningDesign](#)) 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 (Ryan Schultz) should you have any questions or require additional information.

Kind Regards,

Ryan Schultz
OpeningDesign

P.S.

Needless to say, we know this open approach is a new and unique way of working and we would be happy to have a face to face meeting to address any further questions/concerns you may have.

Also, if curious, the following links will give you a sense of how we're harnessing this open approach on a Sports Complex project we're working on in Jefferson, WI.

- For native project files go [here](#).
- For ongoing project communication between the design team go [here](#).

Authorized by:

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

- Signature

- Title

- Date

License

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