

**DRAFT****DRAFT V4**

12 November 2024

Mr. Jon Nelson, P.E.
Assistant County Engineer, Operations
Lake County Division of Transportation
600 W Winchester Road
Libertyville, IL 60048

RE: Lake County Division of Transportation
Proposal – Maintenance and Fleet Services Facility
Feasibility Study and Space Needs Assessment with Option to Perform Architectural / Engineering Services
WA Project No.: 2024-063

Dear Jon:

We are tremendously excited to have been selected to perform a Feasibility Study and Space Needs Assessment for a Maintenance and Fleet Services Facility for the Lake County Division of Transportation, with the option of Lake County DOT to continue with our firm and team for implementation of the project. This Letter of Proposal outlines our understanding of the scope of work, proposed fees and schedule, and general business terms.

PROJECT UNDERSTANDING

The Lake County Division of Transportation wishes to engage Williams Architects for a feasibility study and space needs assessment for a proposed DOT Maintenance and Fleet Services Facility and an option to perform design engineering and/or construction engineering, including all associated site engineering. The feasibility study and space needs assessment work will include an analysis of space utilization; reviewing all existing facilities, equipment use and storage, and all equipment currently stored outside; interviews with various staff members, determine projected requirements for space needs; and estimate impact of industry trends. Following this foundational work, we will work to develop at least 3 conceptual alternatives for a new facility along with associated general cost estimates and determine the proper sequence of work to keep daily operations running during construction of the new facility. Coordination with the Village of Libertyville, utility companies, and other permitting agencies having jurisdiction will be part of this work.

PHASE 1 – FEASIBILITY STUDY AND SPACE NEEDS ASSESSMENT

Our Phase 1 services are divided into seven distinct tasks, as follows:

Task 1 – Project Setup & Data Review: In this task we create a detailed project schedule of all meetings, milestones, and presentations, review all initial information provided by Lake County DOT, and conduct a half-day tour of the existing facility during operating hours to gain a firsthand understanding of the DOT's current operations. *One kick-off meeting plus the aforementioned tour is proposed for this task.*

Task 2 – Staffing and Vehicle Projections: In this task we receive and review the DOT's current and projected staffing information and current vehicle and equipment list. From these materials we work with staff to develop proposed future staffing and vehicle projections that will form the basis of the space program developed in subsequent tasks. *Two meetings are proposed for this task.*

Task 3 – Space Programming: Over the course of four meetings, we work collaboratively with your staff team to develop the exact spaces and sizes needed for the DOT’s operations. We hold meetings with your staff to initially develop a Range Space Program, which indicates a range of areas for each particular space and function. Over a series of meetings, the Range Space Program is refined to a Target Space Program, then a Final Space Program. This Final Space Program becomes the basis for further feasibility study and evaluation of conceptual options and associated costs. Our construction estimating consultant FQC Construction Management is also involved during this phase to provide preliminary order of magnitude square foot budget figures.

Four meetings are proposed for this task.

Task 4 – Existing Building and Site Documentation: During this task (concurrent with tasks 2 and 3), we review available existing documentation, field verify existing conditions, complete building information models to LOD 200 of the existing buildings and site for use in conceptual design. This task shall also include public/private utility location and a topographic/ALTA survey to be completed by a surveying firm acceptable to Lake County DOT.

No meetings are proposed for this task.

Task 5 - Conceptual Design and Cost Estimating: During this task, we develop multiple alternative concepts for the building(s) and site based on the Final Space Program developed during Task 3. Site plans, floor plan diagrams, and 3D massing models are created of each alternative concept. FQC Construction Management remains engaged to provide order of magnitude cost estimating for each concept. We also arrange tours of similar facilities during this phase to inform the team of design features and layouts present in other facilities. Following review of the alternative concepts, one to two concepts are selected for further development into a Final Concept Design, with associated cost estimating. The concepts are developed to LOD 200 standards in Revit.

Four meetings are proposed for this task, including one day of similar facility tours.

Task 6 – Board Presentation: Based on the Final Concept Design and associated cost estimates, we prepare a Final Presentation for Staff to present to the County Board summarizing the findings and outcomes of the Needs Assessment and Feasibility Study. We meet with staff to prepare and tailor the presentation to the DOT’s preferences, then attend a meeting to follow up with any changes or adjustments to the findings based on County Board feedback. We understand that Lake County DOT staff will deliver the presentation to the Board.

Two meetings are proposed for this task to support the process of presenting to the Board.

Task 7- Final Documentation: Based on the Final Concept Design, associated cost estimates, and Board commentary, we develop a Space Needs and Concept Design Book deliverable. We meet with staff to answer questions and refine the materials as required, then finalize the document for Lake County DOT future reference and/or as a basis for future services.

One meeting is proposed for this task.

PHASE 2 – ARCHITECTURAL AND ENGINEERING BASIC SERVICES

Based on the Board approved outcome of Phase 1, we shall provide full architectural and engineering services including structural engineering, mechanical/electrical/plumbing engineering, civil engineering and landscape architecture, assistance with securing geotechnical services, interior design (finish and furniture selection), and technology/low voltage design. These services will be arranged into traditional phases of Schematic Design, Design Development, Construction Documents, Bidding/Permitting, and Construction Administration. Meetings are typically scheduled on a biweekly basis to review progress and design options. During this portion of the project (typically during Schematic Design or Design Development) we will submit documentation as required for Village of Libertyville appearance review, zoning, and/or site plan approval, and attend up to three meetings as required to secure approval of the project from the Village.

Upon completion of construction documents, we assist the County with submission of documents for building permits to the appropriate Authorities Having Jurisdiction and respond to permit review comments as needed. We provide assistance during the bid phase to bid the project to General Contractors, with conducting a pre-bid meeting, issuing addenda to clarify bid documents as needed, conducting a bid opening, and providing Lake County DOT with a recommendation of an award.

During the construction phase, we review submittals, assist the Constructor in responding to requests for information, evaluate change order proposals, and participate in biweekly combined Owner-Architect-Constructor (OAC) meetings and site observation visits. A written field report documenting observations is issued following each site visit. We anticipate

attending approximately forty (40) on-site visits over the course of this project, including an initial punch list inspection and follow-up inspection to clear the punch list.

PROPOSED COMPENSATION

For Phase 1 services, we propose a fixed fee of **ONE HUNDRED SIXTY-FOUR THOUSAND SEVEN HUNDRED NINETY-EIGHT DOLLARS (\$164,798)**, plus reimbursable expenses as described below. Please refer to the attached Exhibit A for a breakdown of specific tasks and fees.

In addition to the tasks indicated above, our fees include an Equipment Survey consisting of inventory of existing maintenance equipment, preparation of an equipment inventory list, and a list of equipment to be relocated during construction.

Our fees also include an allowance for site surveying and private utility locating services by a surveyor acceptable to Lake County DOT. If it is determined that surveying will not be needed for Phase 1, that surveying allowance will not be invoiced.

For Phase 2 services, we would propose a fee based on a mutually agreeable percentage of construction cost as determined by the budget prepared at the conclusion of Phase 1. The fee will be adjusted and converted to a fixed fee at the conclusion of the Design Development Phase in Phase 2.

Our Phase 2 fee is distributed as follows throughout the course of the project:

Schematic Design Phase	20%
Design Development Phase	15%
Construction Documents Phase	40%
Bidding / Permitting Phase	02%
Construction Administration Phase	23%

We shall invoice monthly in proportion to the services rendered. Payment is due in accordance with the provisions of the State of Illinois Prompt Payment Act.

PROPOSED PROJECT SCHEDULE

Based on the December or January approval of our services as discussed, we anticipate the following preliminary schedule for our services, to be finalized and updated as the project progresses, and understanding that there could be multiple bid releases for long lead/early start items as the team mutually determines:

<u>Phase/Task</u>	<u>Duration / Completion</u>
Phase 1 –	
1. Project Setup	1 Month – March 2025
2. Staffing & Fleet Estimates	1 Month – April 2025
3. Space Programming	2 Months – June 2025
4. Existing Building/Site Documentation	(concurrent with tasks 1-3) – June 2025
5. Conceptual Design	2 Months – August 2025
6. Board Presentation Prep	1 Month – September 2025
7. Final Documentation	1 Month – October 2025
Phase 2 (once approved) –	
Schematic Design	3 Months
Design Development	3 Months
Construction Documents	4 Months
Bidding / Permitting	2 Months
Construction Start	TBD
Construction Completion	TBD

ADDITIONAL SERVICES

Additional services specifically approved by the Owner in writing for services above and beyond the services indicated in this Proposal shall be provided hourly at our current schedule of hourly rates. Additional services can also be provided at mutually agreed-upon fixed prices.

REIMBURSABLE EXPENSES

In addition to our professional fees indicated above for Tasks 1 and 2, we shall invoice the County for our reimbursable expenses (mileage, printing, delivery services, misc. project supplies) at our direct costs.

PROPOSAL QUALIFICATIONS

This proposal is based on the following assumptions and qualifications:

1. The County shall provide geotechnical services (soil borings) for our use in developing the documents during Phase 2. We assist the County with securing proposals for geotechnical services and will provide a map and depths of soil borings suggested for the project. Alternatively, we can arrange for needed geotechnical services as a reimbursable expense.
2. Meetings and field time beyond the defined limits will be charged hourly or at a mutually agreed per-meeting or per-visit cost.

CONCLUSION

If you agree with the terms of this Proposal, please sign and date below and return one copy to our office. This Letter of Proposal shall serve as the agreement for Phase 1 services. For Phase 2 services it is understood that this Proposal will become an exhibit of a formal, mutually agreeable Owner-Architect agreement between Lake County DOT and Williams Architects. Thank you again for this wonderful opportunity to be of service to the Lake County Division of Transportation. If you have any questions or comments, please call or email.

Cordially,



Andrew R. Dogan, AIA, NCARB, LEED AP
Managing Principal / Chief Operating Officer

ACCEPTANCE

The Lake County Division of Transportation hereby accepts the Scope of Services, Fees, and Terms listed above and authorizes Williams Architects to begin their services immediately.

ACCEPTED BY:

Authorized Representative – Lake County DOT

Date

Authorized Representative - Printed Name and Title

ATTACHMENTS:

Exhibit A – Proposed Hours and Fee Schedule

