

June 6, 2023

33 Arch Street, 28th Floor
Boston, MA 02110
www.turnerandtowntsend.com

Chris Record, Ph.D.
Cape Elizabeth Superintendent
320 Ocean House Rd
Cape Elizabeth, ME 04107

RE: Fee Proposal, Owner's Project Management Services for the Cape Elizabeth Schools

Dear Dr. Record:

Turner & Townsend Heery, formerly CBRE Heery, was pleased and honored to receive the news that we've been selected to provide Owners Project Management services for the Cape Elizabeth Schools program. We understand how important this project is to the community and we appreciate the trust you have extended to us.

We have reviewed your email dated May 26, 2023 and appreciate the detailed approach that you and the SBAC wish to take to establish a mutually agreeable and reasonable fee for the OPM services. We agree that the best approach is to develop a clear scope of work based on the tasks outlined in the RFP as well as our understanding of the project and our experiences. To that end we have developed the attached scope of work for Phase 1 which ends at the date of the Referendum in November of 2024. We have also provided time frames for each Task in Phase 1.

Based upon this we also established the attached fee proposal. Our fee proposals for professional services are always based on a level of effort and are typically hours worked times rate of the individual(s) who performed the tasks. When asked in the RFP to provide a range for a fee it was based on this concept and as noted was a range for planning purposes only and not to lock either party into a percentage of total project cost contract fee. However, as we developed the fee for Phase 1 we also reviewed a typical design and construction project that would include the following major phases that occur after a successful referendum vote:

- Design Development and Contract Document Oversight
- Additional Estimates at 60% and 90%
- Bidding Support
- Construction Phase Observation – we include a full-time on-site Construction Manager and a full-time Project Manager.
- Close-out Punch List/Warranty Phase Oversight

We propose to develop a more detailed scope of work and fee for the above phases during the development of the final budget amount that we will create for the referendum vote.

Based on our proposed fee for Phase 1 – leading up to the referendum, of \$259,000.00 we can support a total fee percentage of 2.2% of the total program costs with an agreement that should the scope expand, and our involvement warrants additional time and resources, we will have the option to review it with the Town and the SBAC.

We hope this approach to our fee meets with your approval and we can move forward to completing the final contract negotiations and begin work immediately.

Sincerely,



Chuck Adam
Vice President
Turner & Townsend Heery

Cape Elizabeth Public Schools Program
Owners Project Management Services - Scope of Work – Phase 1
Assumed Contract Start Date: July 1, 2023 – Referendum assumed November 5, 2023

- **Task 1 Startup & Analysis – 7/1/23 – 8/1/23**

- **Startup**
 - Develop an understanding of work performed to date including:
 - Project Goals
 - Decision Making Plan and Decision makers
 - Targeted schedule
 - Past Failures / Misconceptions / Perceptions
 - Hot button issues
 - Pitfalls and Lessons learned
 - Weekly Meetings – Remote or In-Person depending on the topic and audience
- **Review existing documents**
 - Review Existing Educational Program
 - Review previous report
 - Make recommendations on completeness

- **Task 2 Designer Selection - 8/1/23 – 10/1/23**

- Identify candidates / Market Project
- Develop project summary and RFQ
- Develop and distribute Addenda as needed
- Review submissions
- Reference checks
- Qualify submission & present to SBAC
- Negotiations & Contract Review
- Make recommendation to Town Manager and SBAC

- **Task 3 Feasibility/Schematic Design – 10/1/23 – 7/1/24**

(Note: Total duration may be able to be shortened based on designer activity)

- Develop Project Schedule
- Develop Project Budget
- Education Programming – 4 Remote Meetings with School District
- Weekly Design meetings/ follow up with budget and schedule updates
- Conceptual Designs Drawing reviews
- Conceptual Designs Estimates
- Schematic Design Estimate of selected solution
- Schematic Design Review of selected option
- Schematic Design VE Estimate (1)
- Schematic Design VE Review (1)

- **Task 4 Community Outreach**

- Community updates (1/month)
 - Monthly meetings



- Monthly SBC meetings
- Weekly Media Updates:
 - Produce material for websites and social media
- 4 presentations to special groups
- 3 major public forums with community feedback/voting

- **Task 5 Funding Options**

- Explore Funding Options
- Make recommendations
- Meet with Towns Financial Planning team
- Review with SBAC

- **Task 6 Referendum – Assumed for planning to end November 5th**

- Community presentations with Architect
- Meetings with special groups
- Organizing Community Effort

Cape Elizabeth Public Schools Program
 Owners Project Management Services - Scope of Work – Phase 1
 Assumed Contract Start Date: July 1, 2023 – Referendum assumed November 5, 2023

Fee Proposal

	months			
Task 1 - Analysis of Previous Work	1	total hrs	rate	cost
Project Executive - Chuck Adam		30	240.00	7,200.00
Sr. Project Manager - Brian Hromodka		60	150.00	9,000.00
Project Manager - Mike Ensminger		60	140.00	8,400.00
Educational Planner(s)		12	265.00	3,180.00
		162		27,780.00
Task 2 - Designer Selection	2			
Project Executive - Chuck Adam		12	240.00	2,880.00
Sr. Project Manager - Brian Hromodka		30	150.00	4,500.00
Project Manager - Mike Ensminger		50	140.00	7,000.00
		92		14,380.00
Task 3 - Design Phase Management through Schematic Design	10			
Project Executive - Chuck Adam		100	240.00	24,000.00
Sr. Project Manager - Brian Hromodka		300	150.00	45,000.00
Project Manager - Mike Ensminger		500	140.00	70,000.00
Educational Planner(s)		24	265.00	6,360.00
		924		145,360.00
Task 4 - Community Engagement				incl w/above
Task 5 - Exploring Funding Options				incl w/above
Task 6 - Development of Recommendation / Referendum Support	2			
Project Executive - Chuck Adam		30	240.00	7,200.00
Sr. Project Manager - Brian Hromodka		50	150.00	7,500.00
Project Manager - Mike Ensminger		50	140.00	7,000.00
		130		21,700.00
Estimating	2 Full Estimates			50,000.00
Total Fee for tasks 1-6 - Through Schematic Design				259,220.00