



## Community Development Authority

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June 21, 2024

Mr. Joseph Alexander  
The Alexander Company, Inc.  
2450 Rimrock Road, Suite 100  
Madison, Wisconsin 53713

### **RE: Letter of Intent - Park and Badger Redevelopment Project**

Dear Joe:

The purpose of this Letter of Intent (“LOI”) is to outline the principal terms and conditions for a Master Development Agreement (the “Agreement”) to be executed between the Community Development Authority of the City of Madison (the “CDA”) and The Alexander Company, Inc. (“Developer”). The Agreement shall memorialize certain business terms, conditions and agreements regarding master planning services and redevelopment services (the “Development Services”) related to an area of the City of Madison known as “the Park and Badger Redevelopment Area” and that is controlled by the CDA, such area known as the “Property” and is legally described and depicted on Exhibit B hereto.

1. **Nature of Agreement.** This Agreement sets forth the principal terms that have been agreed to by the parties concerning the Development Services in order to enable both parties to proceed with an understanding of their obligations and agreements with regard to the Development.

2. **Development Planning and Implementation.**

(a) Request for Proposals and Developer’s Response. On January 9, 2024, the CDA sought proposals under Request for Qualification No. 13001-0-2024-DJ (the “RFQ”) for the Development Services from qualified development partners. The Developer submitted a response to the RFQ, and the CDA Board of Commissioners selected the Developer’s proposal in an open and duly noticed public meeting on April 11, 2024.

(b) Development Services Overview: The Development Services shall be delivered during two phases of redevelopment of the Park and Badger Redevelopment Area:

i. Planning Phase. The Planning Phase aims to create a “Development Master

Plan” related to the development of the Property, which is likely to span a development period of approximately three (3) to four (4) years. The Development Master Plan will consist of the Scope of Work attached hereto as Exhibit A (the “Planning Services”), but generally includes the following:

- (1) vision and physical master planning (“Physical Planning Phase”)
- (2) financial planning (the “Financial Planning Phase”), including the development of an Affordability Plan acceptable to the City of Madison Common Council for the provision of housing units affordable to low and moderate-income households;
- (3) construction strategy and scheduling (the “Implementation Planning Phase”)

Notwithstanding the foregoing, the CDA and the Developer agree and acknowledge that some of the documents created during the Planning Phase may be revisited from time to time if the parties hereto deem it reasonably necessary or convenient to account for changes in the construction or financing environment over the term of this Agreement, provided, however, that the CDA and the Developer recognize that any such changes should be made within the spirit of the work product created during the Planning Phase. For example, if the federal government creates a new financial source that could help achieve the goals of the Development Master Plan, but requires changes to a portion of the Development Master Plan, then the parties could contemplate changes necessary to deploy the new federal government financial source. As a counter example, if a new elected official for the area representing the Property is elected, or the composition of the Board of the CDA changes, the parties will not revisit construction or financing decisions made during the Planning Phase based on political whim. This language is meant to acknowledge that the Planning Phase is based on significant community input and should not be lightly changed; however, it is also meant to plan for a long period of time, during which some changes may be mutually advantageous or may otherwise make the Property a stronger development.

- ii. Building Phase. The Building Phase will be performed one or more times depending on the Development Master Plan. During each Building Phase, the “Development Manager”, defined below, will complete Development Services related to the Building Phase. In each Building Phase, the parties hereto contemplate that they will enter into a stand-alone development agreement for the specific Development Services to be provided in Building Phase. Each Building Phase generally consists of the following:

- (1) financial closing;
- (2) construction services;

- (3) public bidding, if required by any applicable law and if applicable to any particular Building Phase; and
- (4) planning for operations.

### 3. Development Responsibilities.

- (a) Planning Services. Developer shall be responsible for performing or causing to be performed the Planning Services. The actual services delivered shall include all Planning Services reasonably required to complete the Planning Phase and, except as otherwise provided herein, or to the extent the Developer (or its affiliates) are not continuing to work on a Building Phase, to cause each Owner Entity to facilitate each Building Phase of the Development. Developer may subcontract certain elements of the Planning Services as detailed in Exhibit D, with such subcontract(s) to be made by Developer with oversight and approval of the CDA. Notwithstanding the generality of the foregoing, Developer shall remain responsible to the CDA for the Planning Services.
- (b) Development Manager. Developer is anticipated to act as the Development Manager for each Building Phase. The Development Manager will oversee, and be responsible for, the completion of each Building Phase. To the extent Developer acts as Development Manager for a Building Phase, Developer shall also complete the following services (the “Development Services” and together with the Planning Services, the “Services”):
  - i. securing financing determined by Developer in accordance with the Financial Planning Phase, including by completing grant, loan, and credit applications;
  - ii. obtaining necessary governmental approvals related to entitlements (e.g zoning and permitting) for execution of the Building Phase;
  - iii. identifying, preparing and advising CDA with the preparation of applications for approvals to WHEDA and other organizations as applicable;
  - iv. hiring a general contractor or construction manager for the Building Phase in consultation with the CDA and in conformity with any required bidding obligations; the construction contractor shall be awarded by public bid consistent with Wis. Stat. s. 66.1333(5)2. and the CDA and Alexander shall mutually agree upon the criteria for determining a qualified and competent bidder;
  - v. coordinating the Financial Closing of the Building Phase;
  - vi. entering into contracts or agreements, consistent with the terms of this Agreement and with the Planning Services, necessary or convenient for completion of the Development, which contracts or agreements may be assigned, as appropriate, by the Developer to the Owner Entity at or prior to the Financial Closing(s), provided, however that Developer shall not employ or

contract with any third party contractor which has been debarred the CDA and shall promptly terminate any contracts with any third party contractor that is subsequently debarred;

- vii. carrying out pre-construction and construction activities, including design, engineering, and rehabilitation of the Development, and ensuring the Building Phase is completed in compliance with all applicable laws, rules and regulations to the extent decisions are made by or controlled by Developer;
- viii. maintaining regular communication with the CDA regarding the Development Services;
- ix. reviewing all change orders, contingency adjustments and/or any other additional costs (herein change orders) to confirm that they are appropriate and to minimize said costs whenever possible;
- x. reviewing and coordinating the works of Developer's and/or Project Owner's consultants to minimize errors and omissions by said consultants and to minimum the need for change orders to the extent possible;
- xi. forming a limited liability company to own one or more of the Building Phases in conformity with tax credit programs if contemplated (each, an "Owner Entity").

(c) CDA's Responsibilities. As more specifically described herein, the CDA is responsible for the following activities related to the Development (such list is not intended to be exhaustive):

- i. timely reviewing, approving, and submitting financial proposals to WHEDA and other sources of capital;
- ii. funding for all pre-development costs (ex. application fees, design fees, etc.)
- iii. providing required third-party guarantees including investor, lender, and completion guarantees;
- iv. promptly providing information to the Developer related to any applications determined by the Developer to be necessary or convenient pursuant to the Development Master Plan;
- v. assisting Developer in obtaining necessary governmental approvals related to entitlements (e.g zoning and permitting) for execution of the Building Phase;
- vi. coordinating, at the request of Developer, with neighborhood residents and other stakeholders on Development-related issues;
- vii. retaining environmental liability for any preexisting violations of environmental laws with respect to the property on which the Development will be located (including, without limitation, indemnifying the Owner Entity for any costs and expenses associated therewith).

#### 4. Fees.

(a) Planning Services Fee. The parties agree that for the Planning Services, CDA shall pay to Developer a fee in the aggregate amount of Six Hundred Twenty Seven Thousand Six Hundred Seventy Eight Dollars and 00 cents (\$627,678.00) as outlined in Exhibit D. Developer will send to the CDA monthly invoices related to the Development Services performed, such invoices to commence July 1, 2024 and be payable on the 15<sup>th</sup> of each month thereafter; provided, however, the total fee shall not exceed \$627,678.00. To the extent the Planning Services cannot be completed within the twelve-month period following execution of this Agreement, CDA and Developer shall negotiate an additional monthly fee until the Planning Services are completed. If CDA reasonably determines that the Planning Services cannot be completed by May 31, 2025, the twelve-month anniversary of the commencement of the CDA's payment, the CDA and Developer shall negotiate in good faith to determine an extension of this Agreement. In the event the parties cannot agree on such an extension, then the CDA may provide 30 days' written notice of the CDA's election to terminate this Agreement. Upon receipt of such written notice, Developer may immediately commence cessation of its Planning Services.

(b) Development Manager Fee.

- i. In addition to the Planning Services Fee, for each Building Phase the Developer shall be entitled to earn a developer fee for such Building Phase. The Development Manager fee shall be the fair market value of the Development Services for each Building Phase, which will be the approximate amount (or percentage of total development costs) as set forth in the Financial Planning Phase and shall meet WHEDA and/or other lender requirements, as applicable.
- ii. In the event the CDA objects to the Development Manager fee for any particular Building Phase as exceeding the fair market value of the Development Manager's Development Services for the particular Building Phase (and exceeding the amount of the fee contemplated to be paid in accordance with the Financial Planning Phase, and split in accordance with a separate Development Fee Agreement to be negotiated following successful completion of the Scope of Services under this Contract), then the CDA shall provide timely written objection to the Developer indicating that the CDA reasonably believes the Development Manager fee exceeds fair market value. The parties shall work in good faith to resolve such conflict. In the event the parties are unable to resolve the conflict on a timely basis, without negatively impacting the Building Phase timeline, then the CDA shall submit to the Developer evidence from third parties that the Development Manager's fee is in excess of fair market value.
- iii. In the event the Developer is unable to reduce the Development Manager's fee, then the CDA shall have the right to request bids from other qualified businesses

to act as the Development Manager for any Building Phase; provided, however, that the Developer shall have the right to match the terms of any bids provided by other qualified businesses that submit a response and that the CDA wishes to pursue to act as Development Manager for a particular Building Phase.

- iv. If the CDA receives a bid to act as Development Manager for a particular Building Phase that the CDA wishes to accept, the CDA shall first provide notice of the full terms of such bid to the Developer (the "Notice of Bid"). The Developer may elect to proceed as the Development Manager for the particular Building Phase on the terms contained in the Notice of Bid if the Developer provides written notice to the CDA indicating its willingness to accept the provisions contained in the Notice of Bid within ten (10) business days of Developer's receipt of the Notice of Bid. In the event the Developer does not provide such written notice, then the CDA may proceed to enter into negotiations with the third party developer that provided information contained in the Notice of Bid. In the event such negotiations do not culminate in an agreement for such third party to act as the Development Manager for the applicable Building Phase, then the CDA and Developer shall attempt to negotiate a structure for the Developer to act as Development Manager for the Building Phase. If that is not fruitful, then the process contained in this section shall be repeated until the CDA successfully hires a Development Manager for the Building Phase.

(c) Affiliated Entity Fees. In connection with a Building Phase, the construction budget for said phase may include additional fees to affiliates of Developer or to entities selected by Developer (e.g. architects, property managers, construction managers, general contractors, accountants, lawyers, brokers, or other agents thereof). So long as said fees are in accordance with market standards, and said fees were accounted for in the Financial Planning Phase (or in an application to lenders, investors, or credit allocators and done so with the knowledge of the CDA and without objection by the CDA), then the CDA shall not object to any such reasonable fees or expenses to affiliates of Developer or to third parties selected by Developer to provide services to the Owner Entity.

5. **Term.** This Agreement shall begin upon execution hereof, and shall expire (except for obligations identified as continuing beyond the term of the Agreement) upon the completion of all the activities described herein, unless sooner terminated in accordance with the terms provided herein. This Agreement shall terminate as to any particular Building Phase upon Financial Closing (of said Building Phase) and the closing documents for the Development will govern the relationship between the parties to the extent described in such documents, unless this Agreement expressly provides that such subject matter with survive the termination of this Agreement. The parties acknowledge that certain subject matter of this Agreement relates to activities that are intended to survive the term hereof, and so the parties acknowledge and agree to effectuate such matters in the closing documents with respect to each phase.

This "Letter of Intent" does not constitute a definitive statement of all of the terms and conditions of the proposed transaction. This Letter of Intent is not intended to constitute an agreement to execute any contract in the future. If the parties enter into negotiations, either party may terminate such negotiations at any time. Neither party will be legally bound in any manner unless and until a contract has been prepared, executed and delivered between them.

By signing in the space provide below, the parties indicate their desire to begin drafting a definitive agreement. No binding agreement will exist between the CDA and Developer unless and until a Development Agreement is executed between the CDA and Developer.

Sincerely,



Matt Wachter  
Executive Director  
Community Development Authority of the City of Madison

The proposal set forth in this Letter of Intent is acceptable to The Alexander Company, Inc. I further certify that I have the full authority to execute this Letter of Intent on behalf of The Alexander Company, Inc.

By: \_\_\_\_\_  
Joseph Alexander  
President  
The Alexander Company, Inc.

\_\_\_\_\_ Date

Execution of this Letter of Intent by the Community Development Authority of the City of Madison is authorized by Resolution No. 4617, File I.D.83840, adopted by the CDA Board of Commissioners on June 27, 2024.

Prepared by the City of Madison Office of Real Estate Services

Project No. 12846

**EXHIBIT A**  
**Planning Phase Scope of Services**

The Developer shall self-perform development services to the CDA and shall enter into contracts with subcontractors that shall be satisfactory to CDA as detailed in Exhibit D to perform the following work with respect to the Development:

**Project Management and Development Services**

- Act as Developer-Partner of CDA in all aspects of the redevelopment of the Park and Badger Area to produce a Development Master Plan.
  - Resident and community engagement to establish and affirm goals, values, and vision
  - Physical program, site circulation, massing plan and open place concepts and design guidelines
  - Financing Plan with identification of sources and uses necessary to implement the redevelopment
  - Implementation Plan with schedule and phasing plan for the redevelopment
- Serve as lead Development Partner and Project Manager.
  - Manage Development Team including Co-Developers, Engagement, and Design consultants
  - Ensure participation of SBE/MBE/WBE/DBE subcontractors
  - Provide real estate market analysis
  - Manage project schedule
  - Facilitate and document project team meetings
  - Provide progress reports to the CDA
- Assist the CDA with broader public communications and outreach activities including, but not limited to, meetings, presentations, and mailings. This includes all governing bodies, neighborhood groups, and business community.
  - Oversee development of communication tools and project identity
  - Create a strong, positive perception of the planning effort and redevelopment
  - Oversee the creation and updating of project website
- Coordinate and contract with 3rd party consultants and due diligence providers to order the necessary reports, including, but not limited to:
  - Physical Needs Assessments
  - Appraisals
  - Environmental Assessments
  - Surveys
  - Geotechnical Reports
  - Other third-party reports as necessary
- Seek approvals for Development Master Plan including Generalized Development Plan (GDP).
- Work with the CDA to determine the most effective ownership and management structure



for the Building Phases.

- Negotiate the Development Fees for Building Phases reflective of risk sharing, including responsibility for operating and tax credit compliance guarantees.

### **Engagement Services**

- Bring together a small group of diverse, well-connected stakeholders either in one-on-one conversations or small groups to understand how best to engage with residents and community around the various key topics/concerns.
- Work closely with CDA staff and Developer team to develop a list of key stakeholders to advise, inform, and develop the engagement process.
- Collect input from a cross-section of stakeholders representing varying diverse backgrounds connected to race, age, culture, ability, and gender identity.
- Offer a variety of opportunities for the community at large to share their input and perspectives. Tools and strategies for engagement shall include, but are not limited to:
  - Bilingual (English and Spanish) written and oral communications to broader public and targeted outreach to underrepresented and hard to reach populations
  - Surveys (paper + online)
  - Public open houses + workshops
  - Neighborhood and other stakeholder focus groups

### **Financial Analysis and LIHTC Consulting Services**

- Conduct market analysis, appraisals, and financial feasibility analysis to determine the most competitive and effective mix of units and the investment required to implement the Master Plan, and the likely impact of the Park and Badger Redevelopment on the City's tax base and related municipal services.
- Assist the CDA in securing necessary funding for the revitalization project, including but not limited to Low-Income Housing Tax Credits offered by WHEDA, New Markets Tax Credits, and other sources as applicable.
  - Determine if a potential development project is financially feasible and also competitive under WHEDA's LIHTC QAP.
    - Prepare financial models that are compliant with WHEDA underwriting requirements as well as HUD/Section 8 requirements (as needed).
    - Model hypothetical development scenarios utilizing 9%, 4%, and 4% with competitive state LIHTC allocations.
- Identify potential soft sources of gap financing with City/CDA staff assistance.
- Prepare all necessary mixed finance plans and secure the most advantageous investors and equity partners.

## **Master Planning**

- Provide detailed planning for a phased, long-term approach that will replace all existing uses with housing, clinic space, a fire station, and other complementary uses and features the next 3-5 years.
  - Meetings with key stakeholders
  - Develop a preliminary development program
  - Gather and review existing site information
  - Solicit input regarding neighborhood goals, needs and preferences
- Prepare and present Master Plan documentation with goals, values, vision and associated strategies, subject to approval by CDA Board and Common Council
  - Space Needs and Program Requirements
  - Site Plan and Phasing
  - Project Schedule
- Prepare and present Affordability Plan documentation for housing components, subject to approval by CDA Board and Common Council
- Prepare and provide input into CSM and General Development Plan for eventual City approvals

## **Architectural Services**

- Provide architectural services to design a mixed-use building containing multifamily units and an approximately 30,000 sq. ft. Public Health of Madison and Dane County Clinic per the preliminary building program described in the Park and Badger Redevelopment Partnership RFQ.
- Provide architectural services to design a mixed-use building containing multifamily units and a graybox space appropriate for an approximately 16,000 to 20,000 sq. ft. fire station per the preliminary building program described in the Park and Badger Redevelopment Partnership RFQ.
- Provide architectural services to design the buildout of a (minimum) LEED-certified fire station graybox as required by local ordinance, subject to a separate Public Works contract administered by the City of Madison Engineering Division.
- Embrace the City's commitment to incorporating extraordinary energy efficiency, renewable and sustainable building design techniques that contribute to the City's goal to achieve 100% renewable energy and zero-net carbon emissions by 2030.

## **Public Art**

- Provide for the development and incorporation of artwork in public-facing and shared resident/employee spaces throughout all phases of development per the City of Madison's Percent for Art ordinance.

## **Landscape Architecture**

- Conduct Preliminary Site Analysis
- Goal Setting

- Preliminary Design Concepts
- Refinement of Concepts
- 3D Modeling
- Assist with plan phasing
- Cost Analysis
- Provide 2-D renderings, site illustrations and narratives

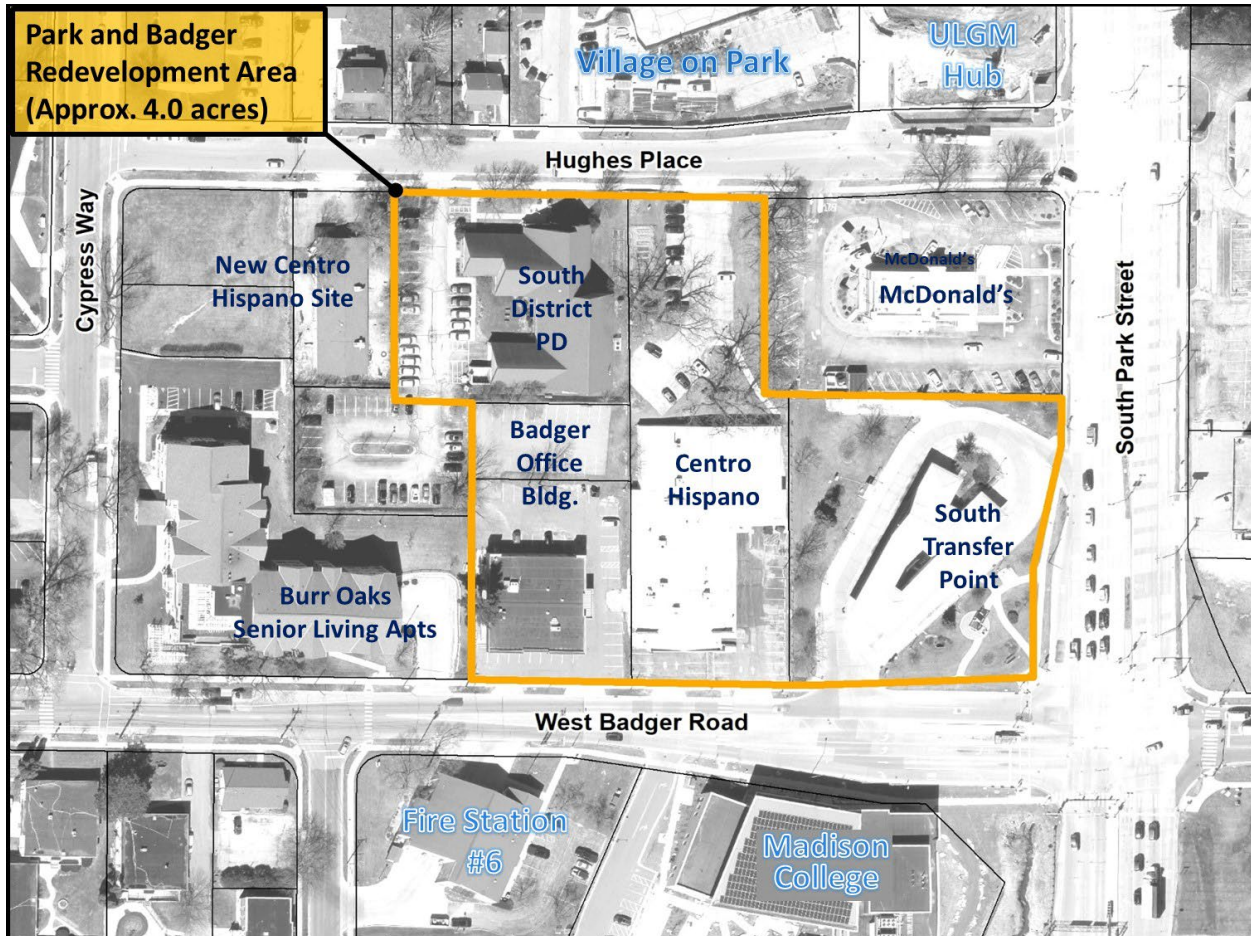
### **Civil Engineering**

- Conduct preliminary site analysis including, but not limited to:
  - Soils
  - Wetlands
  - FEMA Map Review
  - Utilities and Capacity
  - Environmental Corridors
  - Endangered Species Inventory
  - Archaeological Site Review
  - Certified Survey Map, including proposed lot lines post-redevelopment
  - Conceptual Grading plan
  - Utility Schematic
  - Stormwater Management Analysis
  - Demolition plan
- Sustainable Design and Performance Analysis
  - Goal setting
  - Design coordination and recommendations
  - Performance analysis
    - Site and MEP Test Fits
    - Conceptual cost estimating for MEP options
  - Geothermal analysis
  - Goal progress review
  - Refinement and reporting support

**EXHIBIT B**  
**PARK AND BADGER REDEVELOPMENT AREA**

South District PD	825 Hughes Pl	251/0709-352-0323-5*
Centro Hispano	810 W Badger Rd	251/0709-352-0323-5*
Badger Office Building	818 W Badger Rd	251/0709-352-0315-2 251/0709-352-0320-1
South Transfer Point	802 W Badger Rd	251/0709-352-0317-8

*\*properties combined by Certified Survey Map on January 13, 2023*



**EXHIBIT C**  
**LEGAL DESCRIPTION**

**810 W Badger Rd/825 Hughes Pl (Parcel ID: 251/0709-352-0323-5)**

Certified Survey Map No. 16197 As Recorded in Dane County Register Of Deeds In Volume 119 Page 349 of Certified Surveys, Lot 2.

**818 W Badger Rd**

**Parcel A (Parcel ID: 251/0709-352-0315-2)**

Part of the Southeast 1/4 of the Northwest 1/4 of Section 35, Township 7 North, Range 9 East, in the City of Madison, Dane County, Wisconsin, to-wit: Commencing at the Southeast corner of the Northwest 1/4 of said Section 35; thence North 89°29'27" West; 401.34 feet; thence North 0°37'14" West, 208.00 feet to the point of beginning; thence North 89°29'27" West, 133.29 feet; thence North 00°22'32" West, 66.00 feet; thence South 89°29'27" East, 133.01 feet; thence South 00°37'14" East, 66.00 feet to the point of beginning.

**Parcel B (Parcel ID: 251/0709-352-0320-1)**

Part of the Southeast 1/4 of the Northwest 1/4 of Section 35, Township 7 North, Range 9 East, in the City of Madison; Dane County, Wisconsin, described as follows: Commencing at the Southeast corner of said Northwest 1/4; thence North 89°36'24" west, 266.70 feet; thence North 89°38'09" West, 135.0 feet to the point of beginning; thence continuing North 89°38'09" West, 134.18 feet; thence North 00°37'29" West, 208 feet; thence South 89°38'09" East, 133.29 feet; thence South 00°52'09" East, 208 feet to the point of beginning.

**802 W Badger Rd (Parcel ID: 251/0709-352-0317-8)**

Part of the Southeast 1/4 of the Northwest 1/4 of Section 35, Township 7 North, Range 9 East, in the City of Madison, Dane County, Wisconsin, described as follows: Commencing at the Southeast corner of the Northwest 1/4 of said Section 35; thence North 89°19' West along the centerline of West Badger Road for a distance of 266.7 feet; thence North 00°19' West 286.1 feet; thence South 89°19' East 266.7 feet to the East line of said Southeast 1/4 of Northwest 1/4; thence South 00°19' East 286.1 feet along said East line to the point of beginning, EXCEPT that part along Badger Road and South Park Street used for street right of way as described in Document No. 3125316 and that part described in Document No. 4682872 as follows:

Commencing at the West Quarter corner of Section 35; thence South 89°05'54" East, along the south line of said Northwest Quarter, 2397.41 feet; thence North 00°54'06" West, 33.31 feet to a point on the North right-of-way line of West Badger Road and the point of beginning of the lands hereinafter described; thence North 87°51'50" East, 184.36 feet; thence North 00°12'07" East, 95.29 feet; thence North 12°24'13" East, 108.13 feet to a point on the West right-of-way line of South Park Street; thence South 00°05'54" East, along said West line, 61.22 feet; thence South 01°21'32" West, along said West line, 81.17 feet; thence South 06°13'42" West, along said West line, 40.61 feet to a point on the arc of a 29.00 foot radius curve the center of which lies to the Northwest; thence Southwesterly, 41.81 feet along the arc of said curve having a central angle of 82°35'59" and a chord bearing South 47°31'30" West. 38.28 feet to a point on the North right-of-way line of West Badger Road; thence South 88°46'50" West, 51.69 feet; thence North 89°05'54" West, 121.67 feet to the point of beginning.

**EXHIBIT D**  
**PLANNING SERVICES BUDGET**

<b>Professional Fee Allocation</b>	<b>Lead Firm</b>	<b>Amount</b>
Project Management and Development	The Alexander Company	\$100,000.00
Co-Development/Engagement	Captains, Inc.	\$60,000.00
Consulting Development/Engagement	New Year Investments	\$40,000.00
Physical Planning Services*		
<i>Site Master Planning</i>		\$156,690.00
<i>Residential Design</i>		Inc. in Master Plan
<i>PHMDC Clinic Design</i>	Potter Lawson	\$54,000.00
<i>Fire Station No. 6 Design</i>	OPN Architects	\$50,440.00
<i>Landscape Architecture</i>	Saiki Design	\$37,680.00
<i>Civil Engineering</i>	JSD Professional Services	\$34,000.00
<i>Structural Engineering</i>	Pierce Engineers	\$15,000.00
<i>Mechanical Engineering</i>	Design Engineers	\$20,000.00
<i>Public Art Consulting</i>	BrandNu Design Studio	\$46,200.00
<i>Traffic Impact Analysis</i>	Traffic Analysis & Design, Inc.	\$13,668.00
<b>Total</b>		<b>\$627,678.00</b>

\*Design services listed above are through Master Planning. The Fire Station design and the Public Health Clinic portions of the project will be developed further to comply with the city’s predesign checklist and provide program verification and preliminary budget review to inform the City of discrepancies in space or financial needs. This will include a space needs verification, preliminary conceptual floor plans, site plan, building sections, and a summary that includes information on mechanical systems and sustainable design goals. It’s anticipated that design services from Master Planning to CD for each phase will be negotiated in each Building Phase’s Development Agreement.

While the CDA and/or City may elect to provide these items to the Developer, additional third-party reports and project-related costs may be commissioned by the Developer and invoiced to CDA with advance approval. Such reimbursables may include, but are not limited to:

- Printing, Mailing, and Site Signage
- Legal
- Additional Due Diligence (ALTA Survey, Title Work, Geotechnical, Phase I/II ESAs, Appraisals, etc.)
- Rental Space for Public Meetings
- Food, Drink and Music for Meetings

**APPENDIX E**

**PRELIMINARY BUILDING PROGRAM – PUBLIC HEALTH CLINIC AND LAB**

- A. This project consists of design and construction for a new Public Health Madison & Dane County (PHMDC) Office and Clinic space located within the Park and Badger Redevelopment Area (Building A) located in Madison, WI. The Office and Clinic space will occupy space within a new mixed-use development being built by a developer and will consist of primarily ground floor space, with consideration of potentially separating some spaces to other adjacent levels. The City is expecting this Office and Clinic space to be in the range of 30,000 square feet. Final size to be determined during the pre-design/programming exercise.
- B. This single contract with the A/E shall be for all design phases, bidding phase, construction administration phase and warranty administration phase. It is anticipated that the contract shall take approximately three (3) years from contract signing through the end of the warranty phase.
- C. The construction contract may be bid out as a Public Works contract by the City of Madison, or included in the contract for construction of the mixed-use building if included in basis for a Low Income Housing Tax Credit (LIHTC) development.
- D. The A/E design services includes the development and preparation of programming and conceptual plans, space designs, plans and specifications, preparation of bid documents, assistance in the bid process, and construction and warranty phase administration for the spaces.
- E. It should be expressly understood that the initial design phases (primarily predesign and schematic design) will require extensive stakeholder input, including but not limited to, City staff including PHMDC personnel, elected officials, community partners, neighbors and general public.

**F. SITE/BUILDING PROGRAM SUMMARY**

Exterior site	Assume that a reasonable number parking spaces will be required to accommodate parking for PHMDC staff, outside vendors, and guests which can potentially be shared with the associated housing component of the development. Site shall also include drive space for vehicles to drop off persons near the entry to the building. Sufficient space for delivery vehicles and access to the building are necessary. In addition, a clinic/lab drive through window will need to be provided. Additional site amenities shall include landscaped/hardscape spaces for PHMDC staff breaks or to connect with community members, and trash dumpster space in a screened/fenced enclosure.
Community Gathering Spaces	Provide a public entrance to the office and clinic space that includes direct access to the Community Gathering Space and related gender-neutral toilet rooms (accessible from public entrance and available outside PHMDC hours) and comfort room (comfort room accessible to community gathering space and waiting area). This space needs to be able to be securely closed off from other PHMDC spaces. The gathering space should be able to accommodate up to 225 people, but also be able to be separated into thirds. The Gathering Space can be reserved by members of the community, used as a polling place, and used as a training space for PHMDC personnel. It is anticipated this gathering space will require Audio/Visual capabilities, need to be fully accessible above and beyond code minimum, and accommodate people of all ages from infants to elderly. The Gathering Space should include short-term coat storage, furniture storage, and general PHMDC training materials storage. It would be ideal if this space is adjacent and connected to PHMDC breakroom for access to breakroom by PHMDC staff only.
Reception and Waiting Areas	Reception and Waiting Areas shall be located on the ground level. Reception shall include 4 desks behind a secure counter and each desk equipped with a duress button (desks spaced far enough apart to ensure HIPAA compliance). Waiting Area to be ~1,000 square feet. Reception work area behind counter to house 8-10 administration/clinic staff.
Syringe Services Program (SSP) Room	This shall be a small room near/in reception with a door and a window (with blinds for privacy) to accommodate 2-3 people.

Meeting Rooms	This shall be several traditional conference room spaces - 1 to accommodate up to 50 people and be dividable, and 2-3 rooms to accommodate 10-20 people. Accessible by PHMDC staff from the reception area (access control) and from staff offices. The technology/AV equipment and furnishings in the room shall be flexible for numerous room configurations and uses. 6-8 Privacy Booths – nominal size 4’x8’ or ~30 SF each.
Clinic Rooms	Provide 20 Clinic Rooms. Each room is ~120 square feet. Clinic Rooms to be accessible from the Waiting Area via a corridor (access control). Clinic space will also need storage including vaccine refrigerators, locked medication dispensary, etc.
Lab	Provide space for 11 lab workers. Include at least 2,200 square feet for lab equipment.
Drive Through Window	Provide a drive through and drive-up window also equipped with a duress button for the general public to drop off material for the Clinic and Lab. Adjacency with the Lab and Clinic shall be considered. Consideration for door/walk-out access (e.g. Chik-Fil-A).
Office Space	Provide office space for 100 staff, 3 division directors, and 17 managers. Office space shall consider adjacencies by programs as follows: Violence Prevention (VP), Licensed Establishments (LE), Well & Septic (W&S), Animal Services (AS), Prenatal Care Coordination(PNCC)/Nurse Family Partnership(NFP), Communicable Disease (CD), Access to Care (A2C), Tuberculosis (TB)/Immunizations (Imms), Women, Infant, and Child (WIC), and Community Based Public Health Nursing (BPHN)/Fetal Infant Mortality Review (FIMR)/Patient Navigators (PN). Most managers and all division directors shall have private offices while staff shall have a combination of open office workstations, communal space, and benching.
Violence Prevention Rooms	(VP) 5 rooms with doors and windows (with blinds for privacy).
Telework/Hotel	Flexible space for teleworking or future staff changes. 10 staff workstations and 2 private offices.
Personnel Entrance	Provide an entrance space for PHMDC Staff, separate from the reception/waiting area. The space should include storage and mail.
Break Room	A break room with a kitchenette, commercial refrigerator, dish washer, garbage disposal, and microwave shall be included. Views to the outside and adjacency to outdoor break areas is desirable and should be considered.
City IT Network Room	The secured Network Room will include data racks for City IT network equipment.
Mechanical Room	Provide secure space for dedicated building systems noted in the summary below.

#### G. BUILDING ELEMENTS/SYSTEMS SUMMARY

General Requirements	The facility shall be designed to LEED V4 Silver rating minimum. See City of Madison <a href="#">legislative file #07453</a> . The design team shall explore design and opportunities to allow every user and guest to feel secure, safe, and welcome. PHMDC personnel and users of the clinic experience significant stress and require a space that is restorative and supportive. Proper acoustical control measures, including a sound masking system, will be necessary within and between the office, clinic and adjacent residential spaces as well as between various spaces within the office and clinic. Public art should be incorporated throughout and especially in the public spaces per City of Madison <a href="#">legislative file #47273</a> .
Existing Conditions	Site has been previously developed and will be redeveloped as described in this RFQ. The PHMDC Office and Clinic space will be constructed in the new development and the interior spaces completed as part of this contract.
Structure	The PHMDC Office and Clinic space will be fully or mostly located on the ground floor of the structure. It may be possible for the mechanical space to be located on a lower floor. It may also be possible for some office space to be located on an adjacent upper floor, but this would not be desired. Assume a solar electric (PV) system is being constructed on the roof and account for this loading or additional structural reinforcing as required.



Enclosure	All new and high performance with low maintenance requirements.
Interior	The interior program is primarily outlined above, but interior spaces shall be welcoming and follow trauma informed design principles.
Furnishings	Designer will need to accommodate furnishings in their drawings to ensure proper fit, but City will be responsible for specifying/procuring/installing all furnishings on the project.
Fire Suppression	Designed to meet current codes/standards, Madison Fire Department requirements and coverage.
Plumbing	High performance, low maintenance and designed to meet current codes/standards.
HVAC/mechanical	High performance, low maintenance and designed to exceed current codes/standards. New mechanical system to use hydronic heat and/or consider geothermal as a source/sink. System design to meet both WI Code and LEED Rating system requirements. Air borne pathogen transfer is also to be mitigated with the new HVAC system design. Designer to plan to locate all HVAC equipment inside the building and not utilize roof top equipment.
Generator	Provide generator sized to provide full back up power for the entire office and clinic space.
Electrical	High performance, low maintenance and designed to meet current codes/standards. Assume design includes a solar PV system on the roof.
Communications	Design will need to include City fiber and network to accommodate a BAS system. Additional accommodations will be required to support the City's network needs.
Electronic Safety and Security	Assume inclusion of a complete fire alarm system that meets all current code and Madison Fire Department requirements. Assume inclusion of a complete electronic credential system throughout the facility that eliminates the need for most users to have a physical key.
Earthwork/exterior improvements	As needed to accommodate the new development that the office and clinic space is located within. Assume that the landscaping design includes some outdoor spaces related specifically to clinic staff use and trash dumpster space in a fenced/screened enclosure.
Utilities	As needed to accommodate the new development that the clinic is located within.

**APPENDIX F**  
**PRELIMINARY BUILDING PROGRAM – FIRE STATION NO. 6**

This project consists of design and construction for a new fire station located within the Park and Badger Redevelopment Area (Building B) located in Madison, WI. The fire station will occupy “graybox” space within a new mixed-use development being built by a developer and will consist of a single ground floor fire station, a mechanical room that could be located on the ground floor or lower level, and outdoor space(s). The City is expecting this Fire Station to be in the range of 16,000 to 20,000 square feet, and operated as a City-owned condominium separate from the balance of the building. Final size to be determined during the pre-design/programming exercise.

- B. This single contract with the A/E shall be for all design phases, bidding phase, construction administration phase and warranty administration phase. It is anticipated that the contract shall take approximately three (3) years from contract signing through the end of the warranty phase.
- C. The construction contract shall be bid out as a Public Works contract by the City of Madison.
- D. The A/E design services includes the development and preparation of programming and conceptual plans, space designs, plans and specifications, preparation of bid documents, assistance in the bid process, and construction and warranty phase administration for the spaces.
- E. It should be expressly understood that the initial design phases (primarily predesign and schematic design) will require extensive stakeholder input, including but not limited to, City staff including MFD personnel, elected officials, community partners, neighbors and general public.

**F. SITE/BUILDING PROGRAM SUMMARY**

Exterior site	Assume a minimum of 28 parking spaces will be required to accommodate parking for fire station staff, outside vendors, and guests some of which may be shared with the associated housing component of the development. Site shall also include drive space for vehicles to drop off persons near the entry to the building. Sufficient space for delivery vehicles and access to the building are necessary. Additional site amenities shall include landscaped/hardscape spaces for fire station staff outdoor living areas (including a grilling space), designated space to connect with community members, and trash dumpster space in a fenced enclosure.
Community Entrance	Provide a public entrance for direct access to the Community Room and related gender neutral toilet rooms and comfort room. This space and the Community Room should be able to be closed off from other fire station activities.
Community Room	The Community Room can be reserved by members of the community, used as a polling place, and used as a training space for fire station personnel. The technology/AV equipment and furnishings in the room shall be flexible for numerous room configurations and uses. The spaces adjacent to the Community Room should include short-term coat storage, room furniture storage, and general fire station training materials storage.
Personnel Entrance	Provide an entrance space for fire station personnel and guests. The space should include a secured place for keys and mail.
Kitchen/Dining	The kitchen, dining area and adjacent seating area will serve as the main gathering space for fire station personnel. Kitchen should include stainless steel cabinets, a pantry area, dishwasher(s), gas range and exhaust hood, refrigerator(s), microwave, and coffee maker. Appliances are owner furnished. The adjacent seating area may be a grouping of lounge chairs and/or seats at a kitchen island.
Day Room	The Day Room is used for viewing media for entertainment or training and should include comfortable seating for all personnel on duty, large monitor(s), and audio system.
Fitness Room	The Fitness Room should have natural light and adequate ceiling height for equipment use and exercise activities. Equipment is owner furnished.

Watch Room and Office	The Watch Room and Office space should include open desk spaces for 10 staff members, 2 private offices for the Officers, and a separate office for 2 CARES team members. Also include space for a multifunction device and related office needs including space for general files, supplies storage, and reference materials. The Officers' offices should have space for a small meeting table and chairs or a desk configuration that allows for a collaboration space and guest chairs.
Private Sleeping Quarters	Provide 14 private sleeping quarters with 7 adjacent single use restrooms and a locker room for Madison Fire Department personnel with 45-50 lockers. Sleeping quarters should be located in close proximity to the Apparatus Bay floor. Individual sleeping chambers should include an extra-long twin bed, desk, storage closet, and natural lighting control. Also provide related support spaces including comfort room, custodian closet, clean linens storage and dirty linens area. Dirty linens are removed and delivered by an outside vendor.
Officer's Suite	Provide 3 private sleeping quarters and a shared "Jack and Jill" style restroom (as possible) for the Officers on duty.
Apparatus Bay	Provide forward pull-through access and extra deep parking bays for at least 5 Madison Fire Department vehicles including 1 ladder, 1 engine, 1 ambulance, 1 command vehicle, and 1 CARES unit van. Ideally one additional bay for the storage of a reserve apparatus may also be needed. Vehicles would all be in separate bays and would not be stacked front to back. Backing into the Apparatus Bay is not acceptable. The Apparatus Bay should have an exhaust extraction system for all vehicles. Provide a designated cleaning room for gear decontamination located directly off the Apparatus Bay. Adjacent to the Apparatus Bay provide a workshop area with tool storage, medical equipment storage, mop sink, utility sink, turnout gear lockers, turnout gear laundry, dirty restrooms, and hand wash sink.
City IT Network Room	The secured Network Room will include data racks for City IT network equipment.
Mechanical Room	Provide secure space for dedicated building systems noted in the summary below.

#### G. BUILDING ELEMENTS/SYSTEMS SUMMARY

General Requirements	<p>The facility shall be designed to LEED V4 Silver rating minimum. See City of Madison <a href="#">legislative file #07453</a>.</p> <p>The design team shall explore design and opportunities to allow every user and guest to feel secure, safe, and welcome. Madison Fire Department personnel experience significant stress and require a space that is restorative and supportive. Proper acoustical control measures will be necessary between the fire station and adjacent residential spaces.</p> <p>Public art should be incorporated throughout and especially in the public spaces per City of Madison <a href="#">legislative file #47273</a>.</p>
Existing Conditions	Site has been previously developed and will be redeveloped as described in this RFQ. The fire station gray box will be constructed in the new development and the interior spaces completed as part of this contract.
Structure	<p>The fire station will be located on the ground floor of the structure. It may be possible for the mechanical space to be located on a lower floor, but the main fire station spaces may not be separated across upper and lower floors.</p> <p>Assume a solar electric (PV) system is being constructed on the roof and account for this loading or additional structural reinforcing as required.</p>
Enclosure	All new and high performance with low maintenance requirements.
Interior	<p>The interior program is primarily outlined above, but interior spaces shall convey strength, order, and camaraderie.</p> <p>Proper acoustical control measures will be necessary between fire station spaces especially in the sleeping chambers.</p>
Furnishings	Designer will need to accommodate furnishings in their drawings to ensure proper fit, but City will be responsible for specifying/procuring/installing all furnishings on the project.

Fire Suppression	Designed to meet current codes/standards, Madison Fire Department requirements and coverage.
Plumbing	High performance, low maintenance and designed to meet current codes/standards.
HVAC/mechanical	High performance, low maintenance and designed to exceed current codes/standards. New mechanical system to use hydronic heat and/or consider geothermal as a source/sink. System design to meet both WI Code and LEED Rating system requirements. Air borne pathogen transfer is also to be mitigated with the new HVAC system design. Designer to plan to locate all HVAC equipment inside the building and not utilize roof top equipment.
Generator	Provide generator sized to provide full back up power for the entire fire station operation.
Electrical	High performance, low maintenance and designed to meet current codes/standards. Assume design includes a solar PV system on the roof.
Communications	Design will need to include City fiber and network to accommodate a BAS system. Additional accommodations will be required to support the City's network needs.
Electronic Safety and Security	Assume inclusion of a complete fire alarm system that meets all current code and Madison Fire Department requirements. Assume inclusion of a complete electronic credential system throughout the facility that eliminates the need for most users to have a physical key.
Earthwork/exterior improvements	As needed to accommodate the new development that the fire station is located within. Assume that the landscaping design includes some outdoor spaces related specifically to fire station use including an outdoor living area, designated space to connect with community members, and trash dumpster space in a fenced enclosure.
Utilities	As needed to accommodate the new development that the fire station is located within.

**APPENDIX G**  
**PRE-DESIGN CHECKLIST – FIRE STATION NO. 6**

**General**

- All Phase specific requirements shall conform to the general deliverables requirements (i.e. DELIVERABLES BY PHASE; GENERAL REQUIREMENTS, DRAWINGS, SPECIFICATIONS, and DESIGN NARRATIVES AND CALCULATIONS found on pages 8-11 of Exhibit A).
- Field survey existing spaces.
- Functional objectives defined.
- High Impact Issues discussed.
- Goals defined.

**Program Requirements**

- Space Program: gross facility square feet areas and space requirements listed by agency uses and general building uses listed by room name. It shall include the number of functional personnel and any special equipment or systems.
- Space Needs Summary: written text documents and graphics for space relationships, analysis of operational functions including human (public and staff) (back of house and public floors), vehicular, and material flow patterns, flexibility and expandability, special equipment and systems, site requirements, security criteria, and communication relationships and adjacencies. Establish quantitative energy targets, comfort criteria (ASHRAE 55), indoor air quality requirements (ASHRAE 62) and include any requirements of access to daylight
- Staff Program: definitions for staff adjacencies, connections, control and workflow, which will then help to show staffing levels needed to operate the building. This includes planning of staffing levels needed to deliver the quality of service desired
- Final Program: develop functional space needs, identify functional adjacencies that meet the quality of service for the customer, detail in writing the function of each space.

**Existing Site Plan (at least one property around site)**

- Site boundaries, approximate topography, existing buildings, setbacks, and easements.
- Climatic conditions including path of sun, description of flood plain issues related to building location and mechanical and electrical equipment.
- Location of on-site and off-site utilities.
- Natural landscape.
- Pedestrian and vehicular circulation (include direction of traffic on adjoining streets).
- Neighboring land uses, existing and planned.

**Site Plan**

- Building location and massing.
- Parking and service area.
- Plans for surrounding area, relation of each concept to those plans, and summary of relevant recommendations.

**Floor Plans**

- Entrances, lobbies, corridors, stairways, elevators, work areas, special spaces, mechanical rooms for major equipment and air handlers, and service spaces (with the principal spaces labeled). Dimensions for critical clearances, such as vehicles access.

**Building Sections**

- Floor-to-floor heights and other critical dimensions.
- Labeling of the most important spaces.
- Labeling of floor and roof elevations.

**Photographs**

- Photographs showing the site and elevations of existing buildings (or landscape, as applicable) surrounding the site.

**Report** (includes documentation of methodology used, executive summary, value and goal statements, relevant facts, data analysis conclusions, project phases and general scopes of work)

- Site statement, describing: i. Existing site features, ii. Climatic conditions, iii. Topography and drainage patterns, iv. Any existing erosion conditions, v. Wetlands and locations of flood plains, vi. Surrounding buildings (style, scale), vii. Circulation patterns around site.
- Site access: i. Noise/visual considerations, ii. Local zoning restrictions, iii. Federal Aviation Administration requirements, iv. Hazardous waste (report to be supplied by City), v. Pollution,
- Description of each architectural design scheme, explaining: i. Organizational concept, ii. Expansion potential, iii. Building efficiency, iv. Energy considerations, v. Advantages and disadvantages
- Sustainable design considerations: i. Potential for incorporation of renewable energy systems in the design, ii. Potential use of geothermal systems
- Mechanical system and strategy to comply with energy goals.
- Description of structural design scheme considerations for each design scheme explaining: i. design loads, ii foundation system, iii. Building-framing system, iv. Lateral-load resisting system, v. advantages and disadvantages.
- Fire protection design considerations.
- Security features.
- Code statement. Provide a brief statement from each design team discipline member regarding the code requirements that relate to the site and occupancy use. For example, items such as, but not limited to: classification of construction and occupancy group(s), fire resistance requirements and general egress requirements, etc., would be prepared by the design team fire protection engineer.
- Preliminary concept phase cost estimates to be completed by third party after completion of preliminary submission.

#### **Project Schedule**

- Develop project time schedules for the project indicating the expected progress of the work; include architectural and engineering design, bidding, contract execution and construction.

**APPENDIX H**  
**SCHEMATIC DESIGN CHECKLIST – FIRE STATION NO. 6**

**Site Plan (at least one property around site)**

- Site boundaries, approximate topography, existing buildings, setbacks, and easements.
- Building orientation with respect to path of sun.
- Building massing and relationship to massing of surrounding buildings.
- Location of on-site and off-site utilities.
- Grading and drainage.
- General landscape design, showing location of major features.
- Pedestrian and vehicular circulation (include direction of traffic on adjoining design streets).
- Parking and service areas.
- Fire protection, water supplies, fire hydrants, and fire apparatus access roads.

**Site Narrative**

- Description of site and landscape design final concept
- Demolition, if required
- Circulation
- Parking
- Paving
- Landscape design
- Irrigation, if any
- Utility distribution and collection systems
- Method for storm water detention or retention
- Landscape maintenance concept
- Fire protection, water supplies, fire hydrants, and fire apparatus access roads
- Accessibility path for the physically disabled
- Summary of site and architectural design and the design's response to relevant recommendations by City staff

**Architectural Drawings**

- Demolition plans at all areas both interior and exterior
- Floor plans, showing at a minimum work areas, lobbies, corridors, entrances, stairways, elevators, special spaces, and service spaces (with the principal spaces labeled and dimensions for critical clearances indicated)
- Office areas must show proposed layouts down to the office level of detail verifying the integration between the approved program and the building concept is achievable
- Proposed interior layouts showing open office plan and enclosed office plan
- Indicate how major mechanical and electrical equipment can be removed/replaced
- Elevations of major building facades, showing fenestration, exterior materials, and cast shadows
- Elevations of major interior spaces, showing lobby/typical public elevator lobby
- Building sections showing adequate space for structural, mechanical and electrical, telecommunications, and fire protection systems, mechanical penthouses, floor-to-floor and other critical dimensions, labeling of spaces; labeling of floor and roof elevations
- Color Renderings providing sufficient detail to convey the architectural intent of the design at exterior, major lobby areas, and major and typical office spaces
- Acoustical calculations including noise transmission through envelope, interior walls, floors (including raised floors), ceilings, mechanical and electrical equipment
- Dew point locations in building envelope
- Toilet fixture count analysis
- Illumination, day-lighting, and glare analysis
- Passenger and freight elevator analysis
- Loading dock analysis
- Energy analysis (by third party)

### **Architectural Narrative**

- Show in tabular form how the final concept meets the program requirements for each critical function
- A revised description of any deviation from City standards
- Description of final concept, explaining expansion potential and building floor efficiency
- Location and sizes of mechanical equipment rooms for accessibility, maintenance and replacement of equipment (including cooling towers and emergency generators)
- Conveying systems design (passenger and freight elevators)
- Loading docks
- Thermal, air leakage, and operational performance and maintainability of the building envelope
- Design strategy to attain the assigned energy goal
- Operations and maintenance goals (exterior and interior window washing, relamping, etc.)
- Sustainable design concepts (LEED strategy)
- Vertical transportation analysis (passenger and freight elevators and escalators)
- Code analysis (The Code criteria must be reviewed by each design team discipline member to the degree of detail necessary to assure that tasks accomplished in this phase meet all the Code requirements. A Code/Criteria analysis must be prepared by each design team discipline member that documents an investigation of the applicable codes and agency criteria that will govern the design of a specific project. This analysis should alert the City to any conflicts in the project's design criteria so that they can be resolved early. The analysis should also provide a common perspective for the design and review of the project. This analysis is critical in building modernization and repair/alteration projects.)

### **Structural Drawings**

- Framing and foundation plans of the proposed structural system showing column locations, bay sizes, and location of expansion and seismic joints as needed.

### **Structural Narrative**

- Identification of unusual local code requirements
- Code compliance statement
- Name of model building code followed (should be most current)
- Building classification
- Identification of region seismicity, wind speed etc.
- Identification of special requirements

### **Mechanical drawings**

For the system approved and selected from the relevant concepts, provide the following....

- Demolition plans
- HVAC systems including floor plan (Identification of equipment spaces for mechanical equipment and location of mechanical equipment, including size, weight, access to loading docks and freight elevators, and clearance requirements for operation, maintenance, and replacement) and flow diagram(s) (Air flow riser diagrams representing supply, return, outside air, and exhaust systems and water flow riser diagrams of the main mechanical systems in the mechanical room(s) and throughout the building);
- Plumbing drawings of plumbing systems including floor plan (Proposed building zoning and major piping runs and locations of proposed plumbing fixtures and equipment) and systems schematics and flow diagrams

### **Mechanical Narrative**

- A written HVAC narrative describing the selected mechanical systems and equipment (including indoor and outdoor design conditions for all spaces under occupied, 24-hour, and unoccupied conditions; ventilation rates dehumidification, and pressurization criteria for all spaces under occupied, 24-hour, and unoccupied conditions; equipment capacities, weights, sizes, and power requirements; Description of heating, cooling, ventilating, and dehumidification systems for each major functional space; Description of heating, cooling, ventilating, and dehumidification control strategies for each air handling system under occupied, 24-hour, and unoccupied conditions; Fuel and utility requirements; and a code compliance statement).



- Plumbing narrative including Description of proposed plumbing systems, including domestic cold and hot water, sanitary and storm drainage, and irrigation; Evaluation of alternate sources for preheating of domestic water; solar or heat recovery.
- Calculations and energy and water analyses (including building heating and cooling load calculations, and Psychrometric calculations for HVAC systems at full load and partial loads; Partial loads at 50% and 25%, and unoccupied periods, and Energy consumption calculations and analysis in accordance);
- Water consumption calculations and analysis including make-up water for HVAC systems, domestic water consumption , and fuel consumption estimates.

**Fire Protection Drawings**

- Plans showing equipment spaces for fire protection systems and fire protection water supplies, fire hydrant locations, fire apparatus access roads, and fire lanes.

**Fire Protection Narrative**

- Description of the building’s proposed fire protection systems including the egress system
- Code compliance analysis (including the design team fire protection engineer must prepare an analysis of the applicable codes and agency criteria that will govern the design of the specific project. For example, items such as, but not limited to classification of construction and occupancy group(s), rating of structural components, fire resistance requirements, interior finish, occupant load calculations, exit calculations, identification of areas to receive automatic sprinkler systems and/or automatic detection systems, smoke control systems, etc. would be prepared by the design team fire protection engineer as necessary to provide a complete fire protection and life safety analysis for the final concept.)

**Electrical Drawings**

- Plans showing equipment spaces for all electrical equipment to include: Panels; switchboards transformers; uninterruptable power supply (UPS); and generators

**Electrical Narrative**

- Description of at least two potential electrical systems
- Describe the proposed lighting and lighting control system
- Proposed special features of electrical system
- Code compliance statement

**Specifications**

- Table of contents identifying specifications to be used on the project.

**Certification Requirements**

- The architect /engineer must certify that the concept design complies with the program requirements and the energy goals, and local regulatory agencies and review boards. In bullet form, indentify how the proposed design features will support performance expectations of the project. Expectations shall be identified in the project’s design program.

**Energy Analysis (Not by A/E)**

- This deliverable will be completed after submission of the final schematic design submission by the City’s third party commissioning agent.

**LEED Report**

- Prepare and present to City for review and approval a LEED design report to include the LEED checklist of proposed strategy
- Identify proposed elements and highlight features on schematic design documents in both graphic and written summary that address the LEED requirement

**Life-Cycle Cost Analysis**

- A/E shall provide applicable design documentation to support City Life Cycle cost review

**Schematic Design Cost Estimate**

- This deliverable will be completed after submission of the final schematic design submission by the cost estimator (consultant on A/E team).

**Project Schedule**

- Develop project time schedules for the project indicating the expected progress of the work; include architectural and engineering design, bidding, contract execution and construction.