



May 24, 2023

Madison Parks  
City of Madison  
Attn: Risk Manager  
210 Martin Luther King Jr. Blvd. Room 406  
Madison, WI 53703

## **Re: Lake Monona Master Plan Refinement – Exhibit A: Scope of Services**

**Sasaki Project Number: 38150.00U**

Dear Madison Parks,

Thank you for selecting Sasaki to proceed with the Lake Monona Waterfront master plan process. Sasaki is pleased to provide to you this Scope of Services for the Professional Design Services for the Lake Monona Master Plan Refinement Project. This project represents a unique opportunity to create a visionary, inclusive, and environmentally focused master plan for 1.7 miles of shoreline and 17 acres of Madison's foremost public lakefront. This project is the second part of the Lake Monona Waterfront Planning initiative. We are thrilled to continue this journey with Madison Parks (the Client) to create a refined master plan vision for Lake Monona Waterfront.

### **1. Project Understanding**

Following the Lake Monona Waterfront Design Challenge (Design Challenge), Sasaki will initiate the Lake Monona Master Plan Refinement. The primary goals of this planning initiative are to create a welcoming destination for all Madison residents and visitors, connect Downtown Madison to Lake Monona, enhance community connections, increase physical and visual access to the lake, improve Lake Monona's water quality and aquatic habitat, celebrate Frank Lloyd Wright's architectural legacy Madison, and preserve Lake Monona's cultural history from the Ho-Chunk nation to the present day.

The Lake Monona Master Plan scope area includes 1.7 miles of lakeshore and 17 acres of parkland. The planning area includes Law Park, airspace over John Nolen Drive and railroad, John Nolen Drive causeway, and northern portion of Olin Park. The project is bordered by the Bay Creek neighborhood to the south, Monona Bay Neighborhood to the west, and Capital and Marquette neighborhoods to the north and east. The region of design scope is shown in Figure 1 below.

Sasaki will work closely with the Client and Lake Monona Waterfront Ad-hoc Committee (Ad-hoc Committee) to:

- 1) Refine the preferred Master Plan option that Sasaki delivered during Design Challenge (Figure 2), based on recommendations of the Ad-hoc Committee and continued community outreach.
- 2) Assist the plan introduction to the City of Madison Common Council and Board of Park Commissioner for consideration of adoption.
- 3) Assist the Client on Master Plan and Phase 1 implementation strategy to align with the reconstruction of John Nolen Drive.



Figure 1. The region of design scope



Figure 2. The illustrative plan of Sasaki's design during Design Challenge Phase

## 2. Project Team

Sasaki will serve as the prime consultant and project manager for the project and will be responsible for all project communication with the Client. The primary point of contact for the Client is Anna Cawrse, landscape architect Principal-in-Charge and Zach Chrisco, civil engineer Principal.

Working with our sub-consultant team, we will deliver master plan design services for all elements associated with the Lake Monona Master Plan Refinement.

Sasaki will utilize sub-consultants to execute the scope of this project. The project team is as follows:

- Local Landscape Architecture, Civil & Transportation Engineering GRAEF Madison (GRAEF)
  - Eduard Freer, Landscape Architect
  - Fred Groth, Structure Engineer
- Marine & Coastal Engineering Moffatt & Nichol (M&N)
  - Margaret Boshek, PE, Coastal Engineer
- Ho-Chunk Nation Consultant Chloris Lowe
- Branding & Vision Consultant Zebradog

## 2.1 Communication and Coordination

We understand that clear and consistent communication is of paramount importance to the Client. As such, all communication associated with the Lake Monona Master Plan Refinement will run through Sasaki to the Client and vice versa and will be organized such that decisions can be made as quickly as possible. This includes working with the Client to ensure that agendas are clearly established, representatives from Client leadership and sub-consultants are present, and that action items are created. The chart below represents our proposed high-level communication plan.

Meeting Type	Frequency	Method	Attendance
<i>Project Management and Progress meetings</i>	<i>Weekly</i>	<i>Virtual</i>	<i>Ad-Hoc Committee, Madison Parks, Sasaki</i>
<i>Design Presentations</i>	<i>After plan refinement (task 1) and phase 1 (task 2)</i>	<i>In person or virtual</i>	<i>Ad-Hoc Committee, Madison Parks, Sasaki</i>
<i>Project kick-off meeting</i>	<i>Virtual kick-off with Ad-Hoc Selection Committee and workshops during site visit</i>	<i>In-person and virtual</i>	<i>Ad-Hoc Committee, Madison Parks, Sasaki, Consultants (GRAEF)</i>
<i>Public Outreach and Stakeholder Meetings</i>	<i>Up to ten (10) Workshops, and attend up to three (3) existing public events</i>	<i>In person and virtual</i>	<i>Ad-Hoc Committee, Madison Parks, Sasaki, community organization partners and consultants as needed</i>
<i>Council Meetings</i>	<i>Scheduled by the Client</i>	<i>Virtual or in-person</i>	<i>Ad-Hoc Committee, Madison Parks, Sasaki</i>

### 3. Scope of services

The scope of work for Lake Monona Master Plan Refinement is organized into the following tasks:

- Task 1: Master Plan Refinement & Informal Engagement
- Task 2: Phase 1 High Level Study
- Task 3: Phasing & Implementation Strategy
- Task 4: Master Plan Report
- Task 5: Master Plan Adoption Phase Assistance

Sasaki will make the following site visit within this phase of work:

- Trip 1: project kick-off, two (2) day, three (3) Sasaki attendees
- Trip 2: project on-site presentation, one (1) day, two (2) Sasaki attendees
- Trip 3: one trip for up to two (2) Sasaki attendees during the council approval process

#### 3.1 Task 1: Master Plan Refinement & Informal Engagement - 8 Weeks

At the second phase of the Lake Monona Planning initiative, Sasaki will kick-off the project with developing a deep understanding of public survey and design comments from Design Challenge. We will also work with the Client to define and arrange informal workshops to gather feedback from critical stakeholders and communities. By the end of this stage, Sasaki will refine our master plan we delivered during the Design Challenge Phase, including plans, renderings and other supporting documents, based on recommendations of the Ad-Hoc Committee.

## Procedures:

### 1. Project Startup

- Project Management Plan
  - Rigorous project management is essential for effectively marshaling the consultant team, coordinating with the Client, communicating with the stakeholders, and meeting critical deadlines. We will utilize work plan software, live notes, and smartsheets, to forecast critical path processes, define clear accountability and expectations, and take responsibility for our consultant team's success.
- Kick-off Meeting
  - Sasaki will initiate the project and engagement with a two-day trip to Madison. We will have a workshop with the Client to kick-off the project and review roles and responsibilities, the project schedule, the deliverable review process, and present initial findings. We will also set up and review informal workshops plans, and meet key stakeholders and community representatives.
- Communication Plan
  - Sasaki will work with the client to clearly outline communication protocols and procedures
  - The principal and project manager will disseminate communication to the project team members and consultants as appropriate. The team will track all communications and feedback during meetings, work sessions, etc. to ensure that the team has clear direction on how to move forward and to properly address all feedback and directions in an efficient manner. And throughout the project, the team will track the project schedule in order to ensure timely delivery of project deliverables.
  - Our general communication plan includes:
    - Weekly management and progress meetings
    - Live documents utilizing web-based platforms available to the client for comment logs, schedule, and action items
    - Consultant meetings
    - Formal presentations for key milestones
- Detailed Schedule
  - Sasaki will work with the Client and consultants to create a detailed schedule for Task 1, Task 2, Task 3, Task 4 and Task 5.

### Deliverables

- Meeting agendas and meeting minutes
- Project Schedule
- Project communication plan including contact lists, organization charts, communication protocols, authority chains

### 2. Engagement Recap

Prior to the start of the project, the City of Madison collected over 2,400 results from the Design Challenge Public Survey, over 500 pages of written comments, and 49 pages of received correspondence. The Ad-hoc Committee went through a plan evaluation and scoring process, and

collected feedback from engagement consultants and related stakeholders. Sasaki will work with the Client and the Ad-hoc Committee to consolidate the feedback and comments from all parties mentioned above, and later incorporate the key findings to the revised master plan. The engagement consultants will be retained directly by the client for this Phase of work.

## Deliverables

- PPT presentation summarizing survey findings and key feedback, illustrating priorities for master plan refinement

### 3. Workshops

During this phase, a key engagement objective will be to arrange informal workshops with key stakeholders and partners to ensure the project success. Workshops will be hosted in-person or virtual, and the potential focus groups by themes, including:

- City Engineers
- Elected Officials
  - Mayor
  - Alders
  - Wisconsin Department of Natural Resources
  - Dane County
- Stakeholders
  - Downtown Madison, Inc.
  - Destination Madison
- Ho-Chunk Nation
  - Samantha C. Skenandore
  - Chloris Lowe
- Clean Lakes Alliance
- “Friends of” Organizations
  - Nolen Waterfront
  - Friends of Olin-Turville
- Developers
  - Quad Capital Partners
- Architecture
  - Monona Terrace Community and Convention Center Board
  - Frank Lloyd Wright Foundation & Taliesin Preservation
- Recreation
  - Mad-City Ski Team
  - Brittingham Boat
  - Madison Bikes
  - Yahara fishing club and Capital Cities Chapter of Muskies
  - Mendota Rowing club
- Arts and Culture
  - Coda Worx
  - Art Lit Lab
  - Wisconsin Chamber Orchestra

Sasaki will also attend existing public events such as Brittingham Boat Event (6/16), Loop the Lake (6/17), and one public event at the Monona Terrace (7/24). Neighborhood associations will be involved during the public presentation stated above, and the Client will ensure neighborhood association representatives receive direct invites to the event. The final list of topics and invited attendees will be determined in partnership with the Client.

## Deliverables and Meetings

- Ten (10) in-person or virtual workshops
- Brief project overview presentation to serve as an introduction
- Postcards to distribute in the existing public events
- Assisting the Client on coordination and invitation of focus groups

## 4. Master Plan Refinement

Sasaki will work with the Client to create a refined master plan for the Lake Monona Waterfront. This plan will reflect input from the community, the focus groups, and the Ad-hoc Committee. The Ad-hoc Committee is responsible for providing consolidated and coordinated direction for the final refined master plan. After the final presentation, the Ad-hoc Committee will have 2 weeks to consolidate the comments into a single document and provide it to Sasaki.

## Deliverables

- Refined master plan presentation in PPT format, including:
  - Summary of engagement key findings
  - Refined illustrative plan
  - Up to two (2) refined existing renderings and two (2) new renderings
  - Refined diagrams from the competition phase

## **3.2 Task 2: Phase 1 High Level Study - 4 Weeks**

Once the direction on the refined master plan is confirmed by the Client, Sasaki will work with the Client to define the phase 1 boundary and implementation strategies to align with the reconstruction of John Nolen Drive. Prior to this stage, Sasaki will coordinate with the City Engineer to understand and incorporate the needs from the John Nolen Drive reconstruction project, so that the Phase 1 Area concept will be visionary as well as implementable.

## **Procedures:**

### 1. Phase 1 Area Definition

Sasaki will work with the Client to define the Phase 1 Area based on multiple elements such as community desires, project design principles, budget, John Nolen Drive reconstruction project timeline and information, and funding resources.

## Deliverables

- Memo of defined Phase 1 Area boundary

### 2. Phase 1 Area Concept Development

Sasaki will develop the Phase 1 Area concept per recommendations from the Ad-hoc Committee.

## Deliverables

- PPT Presentation of Phase 1 Area Concept
  - Phase 1 Area Illustrative plan
  - Stormwater strategy diagram

- Circulation diagram
- Planting strategy diagram
- Phase 1 Area preliminary Cost Estimate

### 3.3 Task 3: Phasing & Implementation Strategy - 3 Weeks

In concert with the development of the final master plan, Sasaki will create an Opinion of Probable Construction Cost to reflect the refined master plan to help make decisions regarding the final master plan implementation. In addition to the cost estimate, our team brings a wealth of experience in understanding the various aspects of project funding from state and federal grants, capital dollars, and private donations. Our team will work with the Client to develop initial funding ideas to initiate conversations with various stakeholders. Our team will develop an implementation plan that speaks to the preferred phasing of the project and coordinates with the possible funding sources, market condition, critical construction actions, and community desires. This plan, in addition to the Phase 1 strategy on task 3.2, will demonstrate near-term and long-term actions as well as critical path items.

#### Deliverables

- Opinion of Probable Construction Cost
- Implementation and phasing memo
- Refined phasing diagram
- High-level strategies for potential donors and grants

### 3.4 Task 4: Master Plan Report Finalization - 10 Weeks

Sasaki will create a public facing, graphically compelling and easily distributable PDF document for use by the Client. This document will serve as both a capture of the process and a roadmap of the future. It will contain visual materials such as illustrative plans and renderings, more technical information such as diagrams for elements like stormwater management, circulation, programs and operations recommendations, and material guidelines for things like architecture and play areas, as well as process-oriented diagrams such as phasing strategies.

The report will be created after the refined master plan presentation to ensure all comments are picked up and incorporated into the final report. The 10 weeks process includes one (1) two-week review period. The Ad-hoc Committee is responsible for providing one (1) document of consolidated and coordinated comments to Sasaki for the final report refinement.

#### Deliverables

- PDF Final Master Plan Refinement Report including:
  - Executive summary
  - Master plan and engagement process
  - Site analysis
    - Site context
    - History
    - Hydrology
    - Ecology
    - Traffic & circulation
    - Infrastructure
  - Master plan vision
    - Illustrative plan of the overall site
    - Zoom-in vision for each project node

- Site Systems
  - The water dialogue
  - The nature dialogue
  - The city dialogue
  - The community dialogue
  - The culture dialogue
  - The architecture dialogue
- Phasing and Implementation Strategy

### 3.5 Task 5: Master Plan Adoption Phase Assistance - 13 Weeks

After the master plan materials are introduced to the Council, the project will be referred to various standing City Committee before the Council considers plan adoption. A tentative committee review schedule includes:

- 10/17/23 Council Introduction
- 10/25/23 Transportation Commission
- 11/01/23 Board of Park Commissioners
- 11/13/23 Plan Commission
- 11/27/23 Finance Committee
- 11/29/23 Urban Design Commission
- 01/02/24 Council Action

Sasaki will have at least one (1) team member join the meetings virtually to answer questions and comments. Sasaki has budgeted to attend one Council meeting in person. The Client is responsible for providing the initial presentation.

#### Deliverables and Meetings

- Virtually attend Council meetings
- One trip for up to two (2) Sasaki attendees during the council approval process
- A donor event in January or Spring 2024, final date to be determined with the Client

### 4. Exclusions to Scope of Services

The following items are excluded from the scope of services covered by this proposal for both Sasaki and any Sasaki-retained sub-consultants. If required, these items could be provided as part of negotiated additional services.

- Preparation and submission of permits. It is anticipated these processes would commence at later phases of the project.
- Schematic Design of park components.
- Structural evaluation of existing primary and secondary structures.
- Off-site or adjacent site development or work not included in the contract documents.

### 5. Additional Services

The scope covered by this fee proposal does not include any of the following additional services listed below. These services, and others not defined by the base scope of the project above, can be provided on a time or cost basis with compensation negotiated, and with written notice to proceed, in advance of implementation.



- Public meetings and/or community workshops to review design alternatives otherwise not defined in the scope of services
- Additional renderings beyond what is defined in the scope of services
- Site visits or in-person meetings beyond what is defined in the scope of services
- Regulatory agency review and/or approval or permitting processes
- Technical information gathering, including surveys, technical feasibility studies, and technical programming, egress, or security studies beyond what is defined in the scope of services
- Geotechnical engineering investigations
- Environmental investigations or reviews
- Design tasks or schedule extension beyond what is defined in the scope of services
- Project extensions that are not the result of Sasaki's performance may be considered for additional services
- A marketing campaign including printed media, pop-up space(s), an online platform, media partnership(s), and/or social media campaign(s)
- Printed copies of reports
- Preparation of any cost estimates for Life Expectancy & Condition Assessment of any onsite operations, programming, and maintenance planning and budgeting

## 6. Client Responsibilities

The Ad-hoc Committee has been designated as the party responsible for design direction to Sasaki for this project and has the authority for design approval. In the event that the design, as approved by the Ad-hoc Committee but is rejected by others, and redesign is required, such redesign services shall be compensated as additional services.

The Client shall provide the following information or services as required for the performance of the work. Sasaki assumes no responsibility for the accuracy of such information or services and shall not be liable for errors or omissions therein.

- Provide the consultant team with additional existing condition reports including surveys, studies, as-built drawings, design drawings, and geotechnical reports of the project site as relevant beyond the information provided through Design Challenge.
- Provide comments on all design team submissions to Client as a single, vetted, and coordinated document providing clear direction to the design team, within 2 weeks (based on project schedule) of receiving the submission. Comments from multiple sources that contradict one another shall be coordinated by Client.
- Provide additional existing background and GIS information as relevant.
- Identification of individuals who will be part of the expanded working group and input on identifying stakeholders. The Design Team will rely on the relationships of the City of Madison to make sure the correct stakeholders are included in these meetings.
- Establish an agreed-upon written protocol to prevent approved / rejected design and redesign fees.
- Provide the design team a Title Report including information such as easements and other encumbrances on the property.
- Cost of print handout materials, boards, meeting venue rental fees, and documents for stakeholder and public meetings and events unless otherwise included in reimbursable expenses.

## 7. Project Schedule

Based on discussions with the Client, our understanding of the project schedule is described below. Generally, we understand the Lake Monona Master Refinement project to be a four month long process beginning in June 2023, followed by a 13-week Master Plan Adoption Phase led by the Client. The tentative

City committee review schedule started in October. The schedule may be adjusted from time to time to compensate for unforeseen changes or delays in the development of the project. If the schedule changes significantly, Sasaki and the Client will mutually agree upon an adjusted schedule, fee, and payment schedule. Review periods extending significantly beyond those identified in the proposed schedule will impact the efficiency of the design team and may impact compensation.

Project Task	Duration
Task 1: Master Plan Refinement & Informal Engagement	8 weeks (June 1st - July 21st, 2023)
Task 2: Phase 1 High Level Study	4 weeks (July 24th - August 18th, 2023)
Task 3: Phasing & Implementation Strategy	3 weeks (August 7th - August 25th, 2023)
Task 4: Master Plan Report Finalization	10 weeks (July 24th - September 29th, 2023, including 2 weeks reviewing period and final approvals)
Task 5: Master Plan Adoption Phase Assistance	13 weeks (October 10th, 2023 - January 2nd, 2024)

## 8. Professional Compensation

- Labor Fee

Sasaki shall be compensated for the base scope elements on a lump sum basis a fee of \$200,000.00 (two hundred thousand dollars). Our labor fee is calculated based on an estimation of the expected time involvement and related production, and current hourly rates for the Sasaki project team throughout the duration of this scope. Reimbursable expenses are included in the lump sum.

We're thrilled to work with you on this amazing opportunity for the Lake Monona Master Plan Refinement.

Sincerely,



Anna Cawrse, ASLA, PLA  
Principal