



RATIO

Architecture Preservation Interior Design Landscape Architecture Urban Design + Planning Graphic Design

May 14, 2015

Nectarios Pittos, AICP
Senior Planner
Village of Orland Park
Development Services Department
14700 Ravinia Avenue 60462

Re: Stellwagen Family Farm

Dear Nectarios,

Thank you for the opportunity to work with the Village of Orland Park and the Stellwagen Family Farm Foundation to help craft a long term sustainable development plan for the Stellwagen Farm. The Farm is a tremendous cultural resource to the Village and the region. We are very excited about the opportunity to be a part of the Farm's future and to be a resource to the Village for what we anticipate will be years of service. As requested, the following constitutes our design services proposal.

PROJECT SCOPE

The project consists of creating a Marketing and Economic Development Plan for the Stellwagen Family Farm, a 60 acre heritage farm located in the Village of Orland Park. The property was continuously farmed by several generations of Stellwagens for more than 150 years. The property was purchased by the Village in 2002 with the goal of creating a living history farm that offers public educational and recreational opportunities. While the property is owned by the Village, the Stellwagen Family Farm Foundation is the caretaker of the vision and mission of the Farm. The property currently enhances the quality of life for Orland Park residents, continues to function as a working landscape, and provides limited educational opportunities. However, a plan is needed to determine the highest and best use of the property, and to provide a framework for future investment and management.

A conceptual plan of physical improvements was created by Christopher B. Burke, Ltd, and will serve as the general framework for physical design recommendations.

DESIGN SERVICES

RATIO will provide the following services in order to craft the marketing and economic development plan. The process is organized into five Tasks:

Task 1: Regional Analysis and Trends

To complete this task, RATIO will document existing demographics and regional trends. We will focus on market variables that are pertinent to the development of a plan that is intended to (1) identify likely user groups, (2) provide strategies for revenue generation, and, (3) identify what physical improvements or changes will result in the most value added to the property. The analysis will be conducted with publically available on-line data and will likely consist of:

- Current and projected market demographics including: household income, age, ethnicity, educational attainment and property ownership
- Current and projected property values
- Analysis of Orland Park recreational submarket
- Analysis of regional recreational market

Deliverable: Market Analysis and Trends Summary Presentation

Task 2: Case Studies and Comparisons

An important part of any development plan is to understand how the organization compares to other peer organizations. A review of precedents can also reassure the Foundation that they are heading conceptually in the right direction. RATIO will research up to five (5) precedent organizations and/or projects to learn, to the extent the information is available and can be shared, a number of key metrics. In addition, we will analyze these precedents to better understand regional and national competition as well as best practice models. The precedents will be to the extent possible, located in markets similar to Orland Park. These metrics may include but not be limited to:

- The number of visitors
- The recreational opportunities and educational programming offered
- Lessons learned during the development process
- The annual budget (revenue, costs and operating expenses)
- Number of volunteers utilized
- The number of employees, if applicable, their compensation and responsibilities
- Documentation of outcomes of any economic assessments, as applicable

Deliverable: Summary of key metrics for five (5) peer organizations or projects

Task 3: Workshop

The RATIO Team will conduct a half day workshop in Orland Park for the Steering Committee. The purpose of the workshop will be to, (1) review the assembled information from our initial research, and (2), discuss how the information gathered may influence any adjustments to the program and physical changes to the property. The workshop is intended to be a brain storming session, informed by information collected and analyzed in Tasks 1 and 2.

Deliverable: Meeting Minutes of the discussion and conclusions

Task 4: Development Scenarios

With the demographic, precedent information and workshop results in hand, RATIO will be prepared to advance and evaluate initial recommendations for priority projects and the identification of funding sources. The development scenarios will use the current physical plan as a point of beginning and will, if appropriate, suggest program changes as may be needed to meet the goals of the Foundation. The development scenarios will represent varying degrees of the probable initial capital investment and operating costs compared to revenue generation potential. The financial analysis will be conducted for alternative plans that will be informed by the results of demographic and precedent research. The results of the analysis will help the Foundation understand the long term ramifications of program and capital cost choices. Development Scenarios will incorporate:

- Projected attendance
- Probable price points
- Revenue generation

- Operating budget
- Priority projects
- Funding sources
- Staffing and volunteer capacity

The report will be reviewed with the Committee via video conference, GoToMeeting or similar technology. The goal of Task 4 will be to select a preferred development scenario for final exploration in Task 5.

Deliverable: A report documenting expected revenue and costs for up to three (3) development scenarios. The first development scenario will align with the existing physical plan. The second and third scenarios will envision adjustments to the current physical plan and program. The plan and program adjustments are anticipated to result in additional, or alternate, revenue streams and associated costs. The report will be supported with charts and graphs as may be needed to illustrate financial data.

Task 5: Implementation and Funding

The goal of Task 5 will be to define what needs to be done, who should do it, when it should be done, how much it will cost, and the probable return on investment. To that end, RATIO will prioritize the steps, cite the probable costs, list potential/likely funding sources, and identify the persons or organization(s) responsible for implementation of the preferred development scenario. We will identify short-, mid- and long-term implementation projects. This part of the process can be thought of as the roadmap needed to fulfil the project vision. We will also update the plan to reflect any conclusions of the development scenarios refinement discussion.

RATIO will conduct one (1) meeting in Orland Park with the Steering Committee and Village Staff to review the planning process, present the conclusions of the planning process, and answer any questions.

Deliverable: A final report summarizing the conclusions of the 5 tasks. The final report will be supported by charts and graphs as may be helpful to understand investment and return scenarios, photos of the property, and precedent images, but will not include illustrative plans or perspective sketches.

Assumptions and Clarifications

1. To minimize costs, we will provide the final report in digital pdf format.

DESIGN TEAM

RATIO Architects proposes the following design team and roles for the Project:

John Jackson – Principal in Charge. In order to align the scope with the available funding, John will participate in the virtual meeting described in Task 04 and will attend the final presentation. He will otherwise provide oversight and direction “behind the scenes.”

Lesley Roth – Project Director. Lesley will serve as the day to day point of contact for the team and will provide design leadership and management of the process.

Matt Rueff – Economic and Market Analyst. Matt will perform the bulk of the financial projections and analysis required to create the development scenarios.

RATIO has not otherwise included any consultants on our team.

SCHEDULE

From the date of the notice to proceed, we anticipate the following schedule:

Task 1 Regional Analysis and Trends	1 week
Task 2 Case Studies and Comparisons.....	2 weeks
Task 3 Workshop.....	½ day, in week 3
Task 4 Development Scenarios	1 week
Task 5 Implementation and Funding.....	1 week
Total time.....	6 weeks

COMPENSATION

In consideration of the Project Scope, Design Services, and Schedule we propose to provide these services as a lump sum fee of Ten Thousand Dollars (\$10,000).

REIMBURSABLE EXPENSES

Expenses attributable to your project are included in the design services fee. This is based on the following assumptions:

1. RATIO's expenses only include mileage/travel costs from our Chicago office to Orland Park for two (2) meetings. The distance from our office to Orland Park is 26 miles, or 52 miles roundtrip. Therefore the cost for two trips at the IRS rate of \$.57 per mile is \$60.
2. The deliverables will be provided in electronic format (pdf) and, if hard copies are desired by Orland Park, the Village will incur the costs to print as many copies as are desired.

ADDITIONAL SERVICES

Any additional services beyond the identified Design Services, which you may request, will be invoiced at the hourly rate of the personnel assigned to the task.

Firm Titles	2015 Hourly Rates (Subject to annual adjustment)
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1. Principal 1	\$235.00
2. Principal 2	\$210.00
3. Associate Principal 1	\$200.00
4. Associate Principal 2	\$175.00
5. Senior Associate	\$160.00
6. Associate	\$150.00
7. Senior Professional	\$140.00
8. Professional	\$115.00
9. Graduate Professional	\$100.00
10. Intern	\$ 75.00
11. Administrative	\$ 75.00

If an additional service is requested, we will prepare a written proposal, identifying our services and compensation, for your review and approval prior to initiating the requested services.

PAYMENT SCHEDULE

Invoices will be sent monthly and shall be in proportion to services performed. Payment is due upon receipt. Amounts unpaid thirty (30) days after being received will bear interest at one and one half percent (1 1/2%) per month accrued.

INSURANCE

In consideration of the Project Scope, Design Services and Compensation, RATIO Architects will maintain insurance coverage for this project with the following limits:

General Liability

\$1,000,000 each Occurrence Limit, \$2,000,000 Aggregate

Automobile Liability

\$1,000,000 CSL each accident, \$1,000,000 for Hired and Non-Owned Liability

Worker's Compensation

\$500,000 each Accident, \$500,000 Disease Policy Limit

Professional Liability

\$5,000,000 per Claim, \$5,000,000 Aggregate

ABANDONMENT

If the project is abandoned, in part or in whole, payment on account of the services performed will be made upon presentation of a final accounting of services rendered and expenses incurred since the last paid invoice to the date of such action.

Please review this proposal and if all is in order, return an executed copy for our file. A scanned electronic (pdf) copy is fine. If you have any questions, do not hesitate to contact me directly. Thank you for considering RATIO Architects for your interesting project.

Sincerely,



John D. Jackson, ASLA, LEED AP

Principal | Director of Landscape Architecture, Urban Design + Planning

c: Lesley Roth
Matt Rueff

AUTHORIZATION TO PROCEED:

Designated Representative
Village of Orland Park

Date