

EDUCATION PROJECTS FEE PROPOSAL CASE STUDIES

Set out below are four fee proposal case studies produced for Westley Design projects from our learning environment portfolio over the last year.

They involve a range of project types: pre-school, primary school, children's centers, and a range of project budget scale.

The proposals also reflect the flexible range of services that we can deliver; from simple design services to staged stakeholder design consultations and project implementation management on site.

Please refer to our accompanying portfolio document for an explanation of our working principles and illustrations of our learning environment portfolio.

Whatever the nature of your project, we can work with you and your community of children, teaching & support staff, parents & governors, to tailor our services to your ethos, aspirations & resources.

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westley design

Landscape Architecture, Inclusive, Urban & Garden Design

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FEE PROPOSAL CASE STUDY 1

FEE PROPOSAL & PROJECT BUDGET PLANNING: LANDSCAPE / PLAY DESIGN – (CORNISH) PRE-SCHOOL

Dear *****,

It was good to meet with you at your Pre-School today. I hope that you found the session useful in exploring the possibilities of your play space. As we agreed, please find below our fee proposal for the Pre School, play design proposals.

We understand that the **project budget is in the order of £14,000** and have accordingly trimmed our service to a minimum to assist the project as far as possible. In this respect we have assumed that a 'friendly' contractor can be appointed (with our assistance) who can help deliver the project with a degree of autonomy, and without our regular presence on site.

In support of your project, we have also included a pdf of our Design Workshop report as conducted with the client team on the ***** Children's Centre. I hope that it will help you reflect on key aspects of your requirements for the site, so as to develop a clear brief for how you may wish to prioritise use of the space available to you.

1. MASTERPLAN PROPOSAL + REVISION TO MEET BUDGET AVAILABLE & (SCHEDULE OF QUANTITY)

Produce planting design masterplan and schedule of quantities, (including a revision of the design to meet budget, following costing by contractor)

1 day @ £400.00 = £400.00

(including all reasonable expenses for materials, and other disbursements including travel. Please note that I am not V.A.T. registered)

2. ON SITE MEETING WITH CONTRACTOR TO DISCUSS DESIGN FEASIBILITY & IMPLEMENTATION

Once you have approved our design for the site. The plan and schedule of quantities would be issued for pricing to the contractor. When they have priced the proposals, we would meet with them on site to discuss the detailed implementation of the works, in an effort to get the full proposals within a contract figure acceptable to the client. If this is not achievable we would revise the masterplan design to prioritize those elements you particularly require and which we would agree with the contractor within the project budget.

1 day @ £400.00 = £400.00

(including all reasonable expenses for materials, and other disbursements including travel. Please note that I am not V.A.T. registered)

3. DESIGN MONITORING OF CONTRACT, INCLUDING: LANDSCAPE CONTRACTORS, ARTS / CRAFTS & SPECIALIST COMMISSIONS

We understand that the day to day on site management of the construction team would be done by a 'friendly' contractor. They may contact us when necessary for guidance in respect of contract implementation as needed. Their costs will be absorbed within the labour element of the build cost. You will reach a separate contractual agreement with the contractor. Westley Design work in this stage will involve:

a) One half day site visit at the start of the contract to approve setting out of the works by the contractor and to discuss & resolve variations to the design necessitated by site conditions etc.,

b) One half day visit across the project program assuring that the design is accurately and correctly implemented and appropriate quality obtained & to discuss & resolve design amendments with the client and contractor team.

c) A final half day visit at practical completion to check the works, carry out snagging and completion checks with the contractor.

d) We would also recommend on the appointment of artists, crafts people or specialists required to implement specific areas of the proposals and obtain quotations for these services on your behalf.

1.5 days @ £400.00 = £600.00

(Including all reasonable expenses for materials, and other disbursements including travel. Please note that I am not V.A.T. registered)

Grand Total for Stages 1,2 & 3 = £1,200.00 (One Thousand, Two Hundred Pounds) (Inclusive of expenses and disbursements. Please note that we are not V.A.T. registered)

FEE PROPOSAL CASE STUDY 2

FEE PROPOSAL & PROJECT BUDGET PLANNING: Landscape / Play Design – (Cornish) Children’s Centre

Dear *****,

Please find below our financial breakdown for the ***** Children’s Centre play design proposals.

We understand that the revised project budget is now **£38,000.00 (thirty eight thousand pounds)** available for immediate expenditure, in one single phase of implementation.

So far Westley Design, design development costs: including a client consultation workshop and strategic site development design. have amounted to **£1,200.00 (One Thousand, Two Hundred Pounds)**

We would propose that our additional future design and project management costs will be as follows:

To:

1. MASTERPLAN REVISION TO MEET BUDGET & PLANTING DESIGN & SCHEDULE OF QUANTITY

Produce planting design masterplan and planting schedule, (including liaison with the ***** garden centre offering £500.00 in kind contribution to the project)

2.5 days @ £400.00 = £1000.00

(including all reasonable expenses for materials, and other disbursements including travel. Please note that I am not V.A.T. registered)

2. DESIGN MONITORING OF CONTRACT, INCLUDING: LANDSCAPE CONTRACTORS, ARTS / CRAFTS & SPECIALIST COMMISSIONS

We understand that the day to day on site management of the construction team would be done by the contractor, reporting to Westley Design, and that his costs will be absorbed within the ‘labour element of the build cost. You will reach a separate contractual agreement with the contractor. Westley Design work in this stage will involve:

- a) One day site visit at the start of the contract to approve setting out of the works and discussing variations to the design necessitated by site conditions etc.,
- b) Three half day visits across the project program assuring that the design is accurately and correctly implemented and appropriate quality obtained & to discuss & resolve design amendments or challenges with the implementation client and contractor team.
- c) A final half day visit at practical completion to check the works, carry out snagging and completion checks with the contractor.
- d) We would also recommend on the appointment of artists, crafts people or specialists required to implement specific areas of the proposals and obtain quotations for these services on your behalf.
- e) Additionally, if required Westley Design would liaise with the contractor to help organise and deliver sessions of involvement by the Children’s Centre community in the completion of the works, such as planting days and artist / crafts workshops, coordinating with the educational program of the school.

3.25 days @ £400.00 = £1,300.00

(Including all reasonable expenses for materials, and other disbursements including travel. Please note that I am not V.A.T. registered)

Grand Total for Stages 1&2 = £2,300.00 (One Thousand, Two Hundred Pounds) (Inclusive of expenses and disbursements. Please note that we are not V.A.T. registered.

FEE PROPOSAL CASE STUDY 3

WESTLEY DESIGN PROJECT DEVELOPMENT & FEE PROPOSAL – LANDSCAPE DESIGN FOR (a Manchester) COMMUNITY PRIMARY SCHOOL

INTRODUCTION

Westley Design's Role

We would propose keeping our interventions to the minimum, in the interests of best value. We have worked out our fees on a daily rate basis, but with a view to this representing a reasonable, sustainable % of the capital project budget, in line with fee scales for this type of work recommended by the Landscape Institute (the professional body for chartered Landscape Architects). From our conversation, for the purposes of this illustration, I have taken the **budget to total £30,000.00**, available over a two year program.

FEE ESTIMATE UP TO MASTERPLAN & PROJECT COSTINGS STAGE

At each stage set out below, Westley Design's involvement is shown, with fee implications.

Our daily rate (for Practice Principal) is £400.00. This figure includes all reasonable expenses for materials, and other disbursements except travel, for which we charge £0.38p per mile. Please note that we are not V.A.T. registered.

1- LANDSCAPE STRATEGY - 'VISION DOCUMENT'

Following the site meeting, we have brought together the findings of the meeting and our own ideas for developing the different areas of the site.

This information would be presented in a strategic diagram, indicating the nature of the proposals, intended uses & qualities and key elements of each space as annotations against the diagram.

My intention would be to allow you to present this 'in principle' document for the approval of your board of governors at their meeting on Monday 1st March 2009. We would ask you to respond to the plan with your comments both on the ideas and with your priorities for implementation. You might do this by indicating which elements might be implemented in each of the 3 years of your envisaged program.

Our input for this stage would be £400.00 (1 day @ £400.00 per day) including all reasonable expenses for materials, and other disbursements including travel. Please note that I am not V.A.T. registered.

2- MASTERPLAN, PLANTING PLAN COSTINGS & PHASING STRATEGY

- The aim of this stage is to take on board your response to the Stage 1 Landscape Strategy 'Vision' and your thoughts on prioritization, and translate the diagram into a detailed masterplan for the whole site.
- This would be accompanied by a Planting Plan and Phasing Strategy plan which broke the masterplan down into the 2 yearly stages. Each stage would be costed, with some detail of the different elements of each stage, in order to explore its feasibility, within your budget.

Our input for this stage would be £1,200.00 (3 days @ £400.00) including all reasonable expenses for materials, and other disbursements including travel. Please note that I am not V.A.T. registered

3- SCHEDULE OF QUANTITIES, LANDSCAPE CONSTRUCTION DETAILS & CONTRACT TENDERING

- This stage provides a detailed description of the whole project in tabulated text form (materials and workmanship involved, including plants). Together with the Masterplan and accompanying construction detail drawings this package forms the tender package for the contractors to competitively price. The documentation may also be used for targeted funding application.
- Westley Design would assist you in recommending suitable contractor / contractors to for competitive tendering/ pricing.
- (We would assume that you would like to save the cost of our services by copying and issuing the sets of pricing documentation yourself.)
- Once you have copied the returned tenders to us, we would carry out an evaluation exercise to help determine best value and advise you with a recommendation to appoint.
(continued below)

- ***** School would then enter into a separate contract with the contractors. We would advise you using the JCLI form of Agreement as recommended by the Landscape Institute. We would supply you with copies of the form.

Our input for this stage would be £800.00 (2 days @ £400.00 per day) including all reasonable expenses for materials, and other disbursements. Please note that I am not V.A.T. registered

4- MONITORING OF CONTRACT, INC.: ASSESSMENT OF TENDERS & RECOMMENDATION (IF THE PROJECT IS COMPETITIVELY TENDERED), LANDSCAPE CONTRACTORS

We understand that the day to day on site management of the construction team would be done by the contractor, reporting to Westley Design, and that his costs will be absorbed within the 'labour element of the build cost. You will reach a separate contractual agreement with the contractor.

Westley Design's input for this stage would involve the following tasks in each of the phases of implementation:

- One (one day) site visit at the start of the contract to approve setting out of the works for each phase, and resolve any variations to the site conditions.
- One day of time per project phase to discuss design amendments or challenges with your appointed project manager (assuring that the design is accurately and correctly implemented and appropriate quality obtained)
- One (one day) visit at practical completion to check the works, make a list of snagging points for the contractors attention and to discuss ongoing management / aftercare of the installed landscape with you and your landscape maintenance team.

Our input for this stage would be £1,200.00 (3 day's @ £400.00) including all reasonable expenses for materials, and other disbursements including travel. Please note that I am not V.A.T. registered

N.B. this would be repeated in both years of the proposed project program.

Please contact us with any queries you may have or proposed amendments you may wish to make with any aspect of these proposals. When you are satisfied that you have the profile of services that you require from us, and a proposed program for the works, let us know and Westley Design will draw up a final schedule of services and fees and our conditions of appointment for your approval.

FEE PROPOSAL CASE STUDY 4

WESTLEY DESIGN PROJECT DEVELOPMENT & FEE PROPOSAL – LANDSCAPE DESIGN PROPOSALS ***** PRIMARY SCHOOL

Please find set out below our staged fee quotation and project development proposal for your comment/ amendment, and or approval.

It is important that you get the package that you want from us and that doesn't involve us in delivering objectives that your community is capable of meeting themselves. So please read on and then get back to us with your initial thoughts.

INTRODUCTION

Westley Design's Role

We would propose being involved at key stages in the design process, keeping our interventions to the minimum, in the interests of value and instead, facilitating the school community through the design development process.

We have given an indication of our fees for work stages up to the production of the Vision, Masterplan, and Detailed Design & Project Costings.

We have worked out our fees using a daily basis, but with a view to this representing a reasonable & project sustainable % of the capital project budget, in line with fee scales for this type of work recommended by the Landscape Institute (the professional body for chartered Landscape Architects) from our conversation, for the purposes of this illustration, **I understand the budget to be £7,000.00 per year over three years**, including this present financial year.

Please let me know which (if any!) stages you would like us to take on, and feel free to suggest amendments in line with your own vision for how the project should proceed

A- FEE ESTIMATE UP TO MASTERPLAN & PROJECT COSTINGS STAGE

At each stage set out below, Westley Design's involvement is shown, with fee implications.

Our daily rate (for Practice Principal) is £400.00. This figure includes all reasonable expenses for materials, and other disbursements except travel. Please note that I am not V.A.T. registered.

1- LANDSCAPE DESIGN VISION DEVELOPMENT – KEY STAKEHOLDER CONSULTATION METHODOLOGY (you may have already carried out this to a greater or lesser extent...if so skip this section ...and send us your results to incorporate in a briefing document, describing project elements)

The aim of this stage is to ensure that all voices are heard, that all possibilities identified and that this is seen to be done by everybody.

Westley Design would design vision development exercises for each group:

1. schoolchildren
2. teaching staff
3. special needs unit (staff, students & parents)(I have assumed (perhaps wrongly) that the school has an SNU. Without wishing to segregate these folk, in the past we have felt that they have a very special input to make and need special consideration. Happy to take your steer on this)
4. support staff
5. governors
6. parents

(If some of these groups have already carried out this work, then we will obviously work with what has already been produced and amend our service / fee proposal accordingly.)

We would devise written / picture / map based questions or challenges designed to integrate with one another toward an inclusive consideration of the site and its opportunities, by all stakeholders. We would develop these materials in collaboration with you, so as to most effectively use your resources. The school would provide the physical materials to facilitate the work, other than a demonstration copy of each which we would produce and use at our introduction,

We would introduce the challenges to representatives of each group over a day (& evening) session at the school.
Our input for this stage would be £800.00 (2days @ £400.00) including all reasonable expenses for materials, and other disbursements except travel. Please note that I am not V.A.T. registered

2- EXHIBITION & DESIGN CONFERENCE & VISION STATEMENT (you may be happy to run this type of exercise yourself in your own way...if so skip this section ...and send us your results to incorporate in a Vision Statement, framing the project aims and objectives)

The aim of this stage is to ensure that the whole school community work towards 'buy-in' to a shared goal. Westley Design would facilitate & chair three mini-conferences based around exhibition of the Stage 1 work, over the course of one working day and an evening: Each in turn would involve presentations by one of three groups (with attendance by representatives of the other groups):

- one presenting the work of the Schoolchildren,
- the second involving the Teaching and Support Staff and the Special Needs Unit (Staff, Students & Parents)
- the third involving the Governors, Parents & Neighbours) to the other 2 groups.

The findings would be discussed, priorities identified and key issues raised across the school community.

Westley Design would then draw up a summarised record of these findings, for circulation amongst the School community in the form of a Vision Statement. This would be presented in different key themes, targeted to attract further funding (if required), under the following subject headings:

- Accessible environment
- Learning & play
- Safety & community
- Place & creativity

This would set out the prioritised key aims and attributes required of the design, and would mention specific proposals and uses/ needs.

Once we received feedback and modifications required by you, the document would be amended/ re-issued and would provide the briefing basis for our masterplan design.

Our input for this stage would be £600.00 (1.5 day's @ £400.00) including all reasonable expenses for materials, and other disbursements except travel. Please note that I am not V.A.T. registered

3- OUTLINE & FINAL MASTERPLAN DESIGN SCHEDULE OF QUANTITY & COSTINGS

The aim of this stage is to translate the vision into a physical proposal for the **whole school site** and to give the community a chance to comment on and revise an initial design into a finally agreed proposal. The stage also provides a detailed description of the project which can be used for funding application & competitive tendering purposes.

In covering the whole site (3 yearly phases) the design can demonstrate a balance of **(prioritised)** play / learning value. However, it is not cast in stone at this point, but can be adapted to particular need or opportunity across the years.

From the project brief & vision development (**stages 1 & 2**), Westley Design would produce an Outline Masterplan Design, annotated with the key design features & illustrated by 3D sketches, together with outline costings for the proposals.

We would present this proposal to the school during the course of a whole day and note down all comments made and all revisions needed.

(please note that we would be happy for you to present the proposals and take comments for revision, if you wished to save the cost of our attendance. I have given an option cost for either route)

Following confirmation of these revisions with you, we would then make the amendments required and re-issue it to you as the Final Masterplan, together with any detailed construction or design element drawings required and the schedule of quantities. This last document lists all the different construction and planting aspects of the design, in terms of the nature & quantity of materials used and the method of implementing them on site.

This documents main use is to give the contractors and makers who will build the project a way of clearly costing each element, in order that you can see where costs are allocated and make your own judgement call on the play / learning value of each element and manage your budget accordingly.

This would potentially comprise core supporting documentation for all funding applications and the basis for the delivery of the project onto the ground.

Our input for this stage would be £2000.00 (5 day's @ £400.00) including all reasonable expenses for materials, and other disbursements except travel. Please note that I am not V.A.T. registered
N.B. this would be a one off cost covering the three years of the proposed project program.

B- FEE ESTIMATE FROM DETAILED DESIGN TO PROJECT IMPLEMENTATION MANAGEMENT STAGE

4- DESIGN MONITORING OF CONTRACT, INC.: LANDSCAPE CONTRACTORS, ARTS / CRAFTS & SPECIALIST COMMISSIONS

Westley Design's input for this stage would be done on a day rate to a ceiling figure agreed in advance with you, based on our normal rate. As an indication, this would involve: one (half day) site visit at the start of the contract to approve setting out of the works and discussing variations to the design necessitated by site conditions etc., an allowance of a half day of time per project phase to discuss design amendments or challenges with the implementation team (assuring that the design is accurately and correctly implemented and appropriate quality obtained), a final (half day) visit at practical completion to check the works.

We understand that the day to day management of the construction team would be done by Simon read and that his costs and that his costs would be absorbed within the 'labour element of the build cost.

We would also recommend on the appointment of artists, crafts people or specialists required to implement specific areas of the proposals and obtain quotations for these services on your behalf.

Additionally, If required Westley Design would liaise with the contractor to help organise and deliver sessions of involvement by the school community in the completion of the works, such as planting days and artist / crafts workshops, coordinating with the educational program of the school.

Our input for this stage would be £600.00 (1 & ½ day's @ £400.00) including all reasonable expenses for materials, and other disbursements except travel. Please note that I am not V.A.T. registered
N.B. this would be repeated in each of the three years of the proposed project program.

Please contact us with any queries you may have or proposed amendments you may wish to make with any aspect of these proposals.

When you are satisfied that you have the profile of services that you require from us, and a proposed program for the works, let us know and Westley Design will draw up a final schedule of services and fees and our conditions of appointment for your approval. Your acceptance of this document would comprise the agreement or contract for services between us.