

Gensler Team

DETAILED SCOPE OF SERVICES

April 24, 2023

PHASE 1: PROJECT STARTUP

3 weeks

The first step of the proposed process allows our team to collect and review pertinent background materials, confirm a process and data collection methodology, and create the project vision. The first phase is intended to provide a mutual understanding of the process and desired outcomes and ensure that all expectations are aligned.

1.1. TEAM ORGANIZATION

The core project leaders will complete general project start-up activities, including the identification and commitment of other individuals from the Consultant team and the County. During this step, the following will be established:

- Gensler Project Team - including an outline of specific roles and responsibilities
- County Project Team - the County's working team who has primary responsibility for the project, including the County's primary point of contact
- County Steering Committee - the departmental liaisons and/or senior stakeholders with whom we will conduct working sessions throughout the project as well as from whom we can collect and qualify macro level data.

1.2. BACKGROUND MATERIALS COLLECTION

Working with the County's Project Team, we will collect relevant background materials and critical data for review and use throughout the project. Methodologies for acquiring requested data not immediately at-hand will be discussed during the Kickoff Meeting (Task 1.3). The materials to be requested will include, but may not be limited to:

General Information

- Previous County strategic plans
- Department organization charts and mission statements
- 5-year historic headcount and square footages by department
- County budgets for the last 10 years
- Current approved budget
- Previous related studies and reports
- Workspace standards
- Real estate indebtedness information
- Floor plans, CAD or hard copy format (as needed)
- Site maps, surveys and aerial photos, as available

Facilities Information

- Current department occupancy by facility
- Existing appraisals and valuations of owned facilities
- Parking: stall counts for owned and leased lots/garages
- Existing facilities condition assessment information

1.3. KICK-OFF MEETING

The Kick-off Meeting provides the opportunity for our broader project team to meet with the County Project Team. The session is intended to be an introduction to and confirmation of the process, as well as a facilitated discussion on the principal goals of the project. Specific activities include reviewing and confirming the following:

- Consensus on project goals, conditions, and priority issues,
- Project team roles and responsibilities,
- Project management review meeting schedule (e.g. bi-weekly meetings) and quality assurance tasks,
- Scope and reach of project
- Data collection approach and process,
- Communication channels,
- Key project deadlines and milestones,
- Project deliverables,
- County Steering Committee member confirmation,
- Baseline planning assumptions,

1.4. DATA COLLECTION METHODOLOGY FINALIZATION

Based on the preliminary review of the background information available from the County and direction obtained at the Kick-Off meeting, the Gensler team will begin preparation for several parallel data collection efforts. A detailed description of the anticipated data collection methodology can be found in Phase 2.

1.5. COUNTY STEERING COMMITTEE WORKSHOP #1 - PROJECT STRATEGIES AND VISION

Once the project process is finalized, a Project Strategies Workshop will be conducted with the County Steering Committee (virtually or in person). The objective is to discuss the overall potential for the project while creating consensus among key project participants. The intent is to emerge from the meeting with a shared vision and a clear understanding of roles, responsibilities, and expectations for the broader team and members of their departments. Specifically, the meeting will provide an opportunity to align the County Project Team and County Steering Committee visions for the project goals, objectives, process, and outcome. The following topics may be discussed:

- Explain the overall project, the research process, and expected final outcome,
- Set expectations for the required level of County involvement,
- Discuss the issues that County and individual departments are facing (i.e. growth/real estate development requirements, client service delivery changes/challenges, budget

deficits/constraints, regulatory requirements, overcrowding/underutilization, parking, technology changes, etc.),

- Share best practice and trend research around real estate approaches, innovative public/private partnerships, sustainability and green energy opportunities, space planning/workplace trends for both the public and private sector,
- Establish preliminary guiding principles for the Facilities Master Plan and overall goals for the project,
- Discuss the role of “hybrid” work in the County workforce and its impact on real estate needs.

PHASE 2: DATA COLLECTION

6 weeks

2.1 EMPLOYEE SURVEY (WORKPLACE PERFORMANCE SURVEY)

We will begin our data collection process by issuing our proprietary Workplace Performance Survey to County employees (or a subset thereof). This online tool will allow your users of space to directly tell us how their workplace does and does not support their functional needs, both in the office and while working from home. Gensler’s benchmark database also allows the County to compare the performance of its workplace environment to other leading organizations and provides a functional assessment baseline against which pilot studies, future investments and innovations can be measured.

A particular focus of this survey is the employee experience while working from home, both prior to and during the COVID-19 pandemic. Our research indicates that only one in ten U.S. office workers had worked regularly from home before COVID-19. Gauging your employee experiences will be an important input as we think about and craft the future of the County’s workplace.

2.2 FACILITIES CONDITION ASSESSMENT

Upon approval of the data collection methodology by the County, our team’s facility conditions expert Bureau Veritas (“BVTA”) will begin their assessment of the Administration Building and Building 4 at South Campus. The process will include several parallel tracks of information and data gathering:

1- Data Gathering Phase

BVTA will need the support of staff who can provide access to drawings and records. The following is a typical list of exhibits requested:

- Inspection reports (sewer, boiler, chiller, etc.)
- Building systems Maintenance Records
- Maintenance policy documentation
- Owner elected repair list (if available)
- Original building plans (can be viewed on-site)

- Capital expenditure schedules (prior or planned)
- Fire protection / life safety plans
- Rehabilitation budget and scope (draft or final)
- Certificates of occupancy / facility license
- Prior assessments
- Site plan / floor plans
- Accessibility transition plans / studies
- CMMS / IWMS data set

Prior to the Site Phase, BVTA will meet with City staff to discuss facility condition data standards and collection standards to be used for this project.

2- Site Phase

BVTA will need support in the form of escorts while in the two facilities to help access mechanical areas, to discuss with us any known issues in the facility, and to answer other technical questions.

BVTA will conduct a visual assessment of both sites and facilities to observe systems and components, identify physical deficiencies, and formulate recommendations to remedy the physical deficiencies

As a part of the survey, BVTA will survey 100% of each facility, including the exterior and grounds, including the building exterior, roofs, sidewalk/pavement, and recreational/other areas as applicable. They will interview the building maintenance staff about the property's historical repairs and replacements and their costs, level of preventive maintenance exercised, pending repairs and improvements, and frequency of repairs and replacements. BVTA will develop opinions based on their site assessment, interviews with County building maintenance staff, and interviews with relevant maintenance contractors, municipal authorities, and experience gained on similar properties previously evaluated.

BVTA will observe and document all applicable existing conditions appropriate for each component, focusing on the following:

- Site + Infrastructure
- Topography
- Paving, Curbing, and Parking
- Flatwork
- Landscaping and Appurtenances
- Utilities
- Recreational/Community Facilities
- Structural Frame + Building Envelope
- Wall Evaluation

- Curtain Wall – As Required
- Roofing (Non-Invasive Visual)
- Plumbing
- Heating
- Air-Conditioning + Ventilation
- Electrical
- Life Safety + Fire Protection
- Elevators + Vertical Transportation
- Interior Elements
- Food Service Spaces and Equipment
- Special Systems and Equipment
- Limited Accessibility Compliance
- Suspected Fungal Growth
- Environmental Features
- Lead-based Paint
- Asbestos
- Energy Conservation Analysis
- Exhaust Collection Systems (Fire Stations)

3- Report Review Stage

BVTA will provide a complete deliverable for each building, including in-depth “report cards” for each building and summary reports from the data collected. The summary reports include:

- Building overview
- Reserve tables (Immediate, 2-year, 5-year, 10-year, 20-year) - Reports will include current and anticipated repairs and deficiencies, recommended repair and component life-cycle replacements, and cost estimates for repair/replace recommendations.
- Capital needs breakdown (by system and plan-type) - Capital Needs analysis will include a cost database sorted by building system and ranked by priority for repair. The format of the database will allow for reporting by building, system, or priority for repair, and a year-by-year analysis of capital needs.
- Facility Condition Index (also provided portfolio-wide) - A Facility Condition Index will be calculated for each building. This index will be a function of required repairs compared to building replacement costs. The Facility Condition Index will be generated from the data collection/capital planning database and will be updated as components age or are replaced.

The results of this task will inform subsequent evaluation of viable future re-use and/or disposition options and considerations related to capital and ongoing maintenance expenditures, required repairs/renovations, operational efficiency, and other relevant factors.

2.3 DEPARTMENT SURVEY

We will continue our data collection process by issuing an electronic survey to a representative from each department who is well versed in the quantitative aspects of their respective space and facilities. The questions posed by the survey will focus on such issues as:

- Department's function and mission
- Key workload indicators/drivers
- Projected departmental growth
- Primary locational requirements
- Access / circulation / security needs
- Critical adjacencies with other departments
- Client/visitor requirements
- Ability for staff to work remotely
- Ability to deliver services remotely
- File storage / record management
- Meeting & support space requirements
- Parking – staff & public
- Pressing/critical issues at the facility level

Once the surveys are completed and returned, we will conduct follow-up meetings with each representative to review the results of the survey and discuss any key issues in more detail (discussed in the next task).

2.4 SENIOR DEPARTMENT LEADERSHIP INTERVIEWS (UP TO 13)

We will conduct interviews with key department leaders to review the completed survey forms and discuss high-level qualitative issues. This will provide us with a “view from the top” in terms of the major issues facing County departments that occupy facilities under study in this phase of work. Topics will include:

- Overview and background of department and its mission,
- External and internal factors that may drive change in the future,
- New organizational and/or business process initiatives being implemented to improve customer service and department performance,
- Qualitative and quantitative department needs,
- Planned development projects,
- Major facilities challenges attendant to space, parking, storage, technology, costs, etc.,
- Collocation opportunities and challenges, centralization vs. decentralization, etc.,
- Review and clarification of survey answers.

2.5 SITE TOURS

In conjunction with the Leadership Interviews or as a separate effort, we will conduct tours of facilities identified by the County. In preparation for the tours, we will review facility floor plans (as available) along with building condition assessment information provided by the County. During the tours, we will validate layout efficiencies, suitability for the current user, vacancy,

overcrowding, storage, and other relevant factors. The results of these assessments will be factored into our options and recommendations.

2.6 BOARD OF SUPERVISORS PRESENTATION #1: PRELIMINARY FINDINGS

Gensler will summarize key findings that emerge from preceding Phase 1 and present them to the Napa County Board of Supervisors (the “Board”). The slide presentation will focus on key opportunities and challenges, themes, and goals related to this study, which will be based upon Gensler’s preliminary assessment of documentation and data received to-date as well as any feedback collected in preceding tasks, including sentiments expressed by County representatives during Workshop #1. While the primary purpose of this presentation is to keep the Board apprised of work progress to-date, Gensler will also record any feedback received from the Board, which may be used to refine the approach and/or areas of focus in subsequent tasks. Gensler will be available to present directly to the Board of Supervisors, either in-person or via videoconference, as appropriate.

PHASE 3: ANALYSIS & FINDINGS

8 weeks

Upon completion of the data collection efforts, the Gensler team will analyze the information and conduct a series of interactive work sessions, both internally and with County representatives, to synthesize the collected information.

Our approach to both internal work sessions and meetings with the Steering Committee is to have them be as interactive, inclusive, and focused as possible. During our internal work sessions in particular we make use of all the walls in a virtual “war room” and work through issues in a dynamic setting with all the experts online. In our meetings with the Steering Committee, we will employ collaboration tools through which we garner feedback and additional input as our recommendations take shape. Steering Committee meetings can take place virtually or in person.

3.1 STAFFING PROJECTIONS

To assist in the process of developing useful forecasts for County space, we will first perform an analysis of the relationship between historic County employment and overall population trends. This will give us the historical perspective on growth. We will then compare this trend to the headcount projections provided by departments in our department questionnaire. If the two methods show different results, we will discuss the gap during our Findings Workshop and arrive at a supported growth rate. Appropriate space standards will then be applied to the employee growth forecasts to yield estimated square footage requirements. As part of this process, we will review your existing County space standards and, if needed, develop a new set of macro space standards based on current trends and benchmarks.

3.2 DEMAND AND SUPPLY GAP ANALYSIS

One of our initial tasks will be to outline the gaps between the existing County supply of facilities and the demands for space dictated by department operations and growth. This analysis will be one of the key drivers in determining the future direction of the County portfolio as we develop master planning options in the next phase. Among other aspects, we will evaluate the potential impact of continued work from home post-pandemic, and how that impacts the amount of space required to house County employees.

3.3 FINANCIAL ANALYSIS

Gensler will develop an understanding of the general real estate market and specific County land and facilities that may no longer be needed for County use. Specific areas of focus include:

3.3.A REAL ESTATE MARKET ASSESSMENT

The team will review recent completed or proposed potentially comparable developments and conduct interviews with local brokers, leasing agents, and developers to help identify product/land use types that would make sense to consider for property potentially no longer needed to accommodate the County workforce. Assuming residential and/or hotel use is the predominant potential alternative use, we will obtain estimates of obtainable rents, operating costs, sales prices, average daily rates, and occupancy rates for the identified land uses/product types. The rental rates or sales prices for residential uses will be mapped as a function of distance to the property to identify how pricing varies by age, type, and size of the housing products and other uses

3.3.B ADAPTIVE REUSE AND DEVELOPMENT ANALYSIS

The identified development programs for the properties potentially no longer needed for County functions will be used to obtain order-of-magnitude cost estimates for each separate product type and project for the associated properties. The cost categories will include demolition, sitework costs, parking, construction hard costs, and soft costs (e.g., architecture, engineering, municipal fees and other non “bricks and mortar” costs). We will interview developers/builders or construction contractors and utilize our teams cost estimator to obtain perspective about costs.

3.3.C DISPOSITION ANALYSIS

The values that would be supported by the identified alternative uses will be estimated for each separate property that may no longer be needed for County use. For each alternative, the estimated development costs, rents or sales prices, operating expenses, marketing costs, financing costs, and capitalized sales values will be estimated. The real estate financial analysis will include preparation of discounted cash flow forecasts and estimates of the total market values of the built space as well as the residual property values

3.4. ADDITIONAL RESEARCH AND SYNTHESIS

During this activity we will incorporate what we learned from the Project Team Meeting into our analysis. We will also augment what has been learned to date with any additional reconnaissance at County facilities, with specific departments or in further researching relevant workplace and service delivery trends.

3.5 COUNTY STEERING COMMITTEE WORKSHOP #2: FINDINGS

We will facilitate a second meeting with the Steering Committee to present our findings culled from the activities to date. The meeting will focus on the current supply of County facilities, the demand for space based on our surveys and interviews, the gap between supply and demand as expressed in facility needs, and the results of our financial analysis tasks. Input from the Steering Committee during this meeting will help our team begin to formulate options and scenarios in the next phase.

PHASE 4: OPTIONS DEVELOPMENT

8 weeks

This phase sets the framework for the County Facilities Master Plan by pulling together all information obtained in the previous tasks into and presenting County stakeholders.

4.1 DEVELOP SUITABLE ALTERNATIVES

Based on the feedback obtained from the 2nd Steering Committee Workshop, we will develop up to three (3) planning options that address site, programmatic and facility issues for County properties. Staff growth and corresponding space needs, and critical adjacencies and separations, infrastructure and parking will be all illustrated in a series of summary diagrams that both capture the existing conditions and convey growth across the 10-year planning horizon. We will also identify any land or facilities that are not currently projected to be needed for use by County departments. The following aspects will be considered:

- Potential new building location(s),
- Parking,
- Facility condition,
- Security,
- Potential “hybrid” work model,
- Current and projected space needs,
- Current space utilization,
- Customer service and office locations,
- Organizational and cultural drivers,
- Departmental adjacencies,
- Service delivery geography,
- Staff retention and recruitment,
- Sustainable strategies,
- Quality of the workspace,

The options will meet functional needs and fiscal realities, ultimately leading to “highest and best use” recommendations that also fulfill the planning and development principles established early on in this engagement. The subsequent models will each take into account the issues of funding source restrictions and projected growth figures. In parallel, we will evaluate strategies for housing the County’s workforce, consolidation and collocation opportunities, addressing future service delivery needs, providing adequate parking, and accommodating any projected operational changes.

4.2 ROM CONSTRUCTION COST ESTIMATES

We will develop high-level construction cost estimates for the master plan scenarios being put forward for consideration. Cost will include demolition, site clearance, hard construction, and contingencies. We will also coordinate with the County to better understand costs that might be unique to delivering projects within the County’s bureaucracy.

4.3 COUNTY STEERING COMMITTEE WORKSHOP #3: OPTIONS REVIEW

During the project process we will determine whether the County Steering Committee will be involved in narrowing the list of alternate scenarios. We have found that including a broader group consistently ensures that the project outcomes will have support from a breadth of staff. However, depending on the size of the Steering Committee, it may be more effective to limit this meeting to the County Project Team. In either event, this meeting will be an active dialogue between the Gensler team and the County about the pros and cons of each alternative. During the meeting, we will together narrow the list of options and build consensus for a particular real estate planning construct that will ultimately form the County Facilities Master Plan.

4.4 BOARD OF SUPERVISORS PRESENTATION #2: OPTIONS REVIEW

Gensler will incorporate feedback and direction from Workshop #3 and prepare an executive summary presentation that distills refined findings, themes, plan alternatives, and preliminary recommendations shared with County representatives in Workshop #3. Any feedback received from the Board will also be integrated into the determination of a refined option. Gensler will be available to present directly to the Board of Supervisors, either in-person or via videoconference, as appropriate.

4.5 OPTIONS REVIEW TOWN HALL MEETING

Using the same slide presentation as in Task 4.4 (Board Presentation #2), Gensler will provide interested parties from the local community with an overview of the facilities planning options in an open “town hall” format. This presentation will largely mirror the one presented to the Board but, if desired by the County, Gensler can also solicit feedback on plan option aspects that are most relevant to County constituents. Potential topics for feedback may include desired improvements for County service delivery or public-facing operations, desired improvements in infrastructure surrounding County facilities, and/or desired changes in land use of County-owned parcels, etc.

PHASE 5: FINAL DOCUMENTATION

6 weeks (excluding a County review period)

All reports prepared by our team will be delivered as an Adobe PDF file, enabling the County to produce hard copies as needed. Gensler will also deliver relevant Excel files, GIS datasets, and other documents created for this project, as requested.

5.1 DRAFT COUNTY FACILITIES MASTER PLAN REPORT

Gensler will document the feedback from the previous Workshop #3 and direction from the Board of Supervisors develop a Draft County Facilities Master Plan Report (“Draft Report”) for the County to review. The report will address, among other items, the following:

- Current and Projected Space and Parking Needs,
- Customer Service and Office Locations,
- Existing Facility Conditions,
- Organizational and Cultural Drivers,
- Departmental Adjacencies,
- Conceptual Stacking Plans in Proposed or Renovated Facilities,
- Service Delivery Geography,
- Staff Retention and Recruitment,
- Quality of the Workspace,
- County Demographic Changes,
- Real Estate Markets and the Economy,
- Due Diligence Concerns,
- Financial Considerations,
- Land Consolidation.

5.2 BOARD OF SUPERVISORS PRESENTATION #3: DRAFT REPORT REVIEW

Gensler will prepare an executive summary presentation that highlights key aspects of the draft County Facilities Master Plan Report, focusing on the plan’s key facility planning recommendations as well as associated cost, operational, service delivery, and other pertinent implications, to be determined in consultation with the County project team. Gensler will be available to present directly to the Board of Supervisors, either in-person or via videoconference, as appropriate.

5.2 FINAL FACILITIES MASTER PLAN REPORT

Gensler will revise the Draft Report to include all feedback and comments from the County Project Team and develop a Final County Facilities Master Plan (“Final Report”), which may include:

- Executive Summary,
- Project/Process Narrative,
- Planning and Development Principles,

- Existing Conditions summary,
- Program Requirements,
- Options and Recommendations,
- Financial Analysis,
- Development Guidelines/Criteria,
- Costs.

5.3 IMPLEMENTATION GUIDE

Included in the Final Report will be a brief discussion of the activities associated with implementing and phasing the Facilities Master Plan, with a special focus on downtown and South Campus, including:

- An implementation timeline, summarizing activities and potential future expenditures,
- The use of “swing space” as needed during construction (office and parking),
- Development priorities,
- Guidelines for future space planning,
- Change management activities to consider.