

August 9, 2015

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### **Summary Report**

This document summarizes the work of the task force and represents the basis of our recommendation to the ASUUC Steering Committee to contract with a firm for architectural services. The primary purpose of this task force was to identify, manage and execute a plan by which to select an architectural firm to move forward with developing a Program, Conceptual Design and Cost Estimate for renovating All Souls Unitarian Universalist Church. The task force relied on the work done previously by the Vision Task Force, the Building Renovation Concepts Team and the Feasibility Study Task Force wherein members of the ASUUC have previously provided input. The task force also relied heavily on archival information from the 2007 capital campaign effort, during which time a similar committee was established to select an architect. These archives illustrated important priorities of the congregation and committee during that campaign and as such, our task force took them into consideration during our efforts.

To begin, we identified primary tasks, proposed a schedule of completion for these tasks and guidelines to govern our work. Please reference the ASTF Charter document for a more detailed description. Providing conceptual design that inspires our congregation towards a successful capital campaign, building consensus across multiple user groups, working within a limited project budget and potentially renovating the existing ASUUC are challenging endeavors for any architect. Considering the importance of our selection, we agreed that architectural design firms would be primarily solicited on a qualifications basis, with consideration given to areas of importance such as: experience and competence of proposed team members, performance history,

experience with sustainable building methodology, commitment to diversity within the firm and on project teams as a whole and the ability to work in a democratic process with high congregational input. An RFQ, (Request for Qualifications), document was created that described the ASUUC's mission, offered a detailed project description and background, identified governing bodies to facilitate the selection and design process, proposed selection and project schedules, and listed submission requirements with evaluation criteria. The task force identified fifteen qualified local firms to receive the RFQ, of which: three are MBE, (Minority Business Enterprises), and WBE, (Women's Business Enterprises); six have women in leadership positions as principals or owners with whom we have a reasonable expectation of working with on our project; four have past history with ASUUC as part of the 2007 campaign; one specializes in church renovations similar to our proposed project; one specializes in general architecture. A building tour was conducted on Thursday, July 9th for interested parties. Of the fifteen firms solicited, five firms responded to the RFQ, of which: one is a WBE; one is an MBE/WBE; two have women in leadership positions as principals proposed to work on our project; one has worked previously for the Shawnee Mission and Lawrence, Kansas Unitarian congregations. Based on the proposals of the five firms, three were unanimously selected to interview.

In parallel with the selection of an architectural design firm, the task force also resolved to procure evaluations of the existing building's structure, mechanical, electrical and plumbing systems, and existing roofing. The purpose of which is to first identify necessary repair work to be considered for capital campaign fundraising and second, to determine if there are advantages to improving these systems in a strategic manner based on the direction of the concept design. The task force requested three bids for each type of evaluation. We received proposals from eight qualified firms, of which: one is an MBE/WBE; one is an MBE; one has a minority in a leadership position

as a principal heading up the division for the evaluation we are soliciting. Based on the scope outlined in each proposal, fees and our commitment to diversity, three were unanimously selected for the work.

Throughout our process, we have endeavored to communicate our efforts to the congregation and encourage feedback. We posted all pertinent documentation on the ASUUC website, including the Vision Initiatives Report, the Renovation Concepts Report, the Next Steps Weekend Report, the ASTF Charter, the Request for Qualifications document and proposals from the top three firms that were selected to interview. We invited the congregation to review hardcopies of the top three proposals in the lobby after church. We participated in impromptu discussions with church members regarding specific concerns and scheduled a church chat in response to questions raised by the Social Justice committee about diversity in our selection process. Our task force was grateful for all feedback and incorporated it into our process in the form of interview questions and selection criteria.

Interviews were scheduled on Thursday, July 30th based on availability of design team and task force members. As part of our interview preparations, the task force verified references for each of the three firms, composed an interview format and schedule and created an interview scorecard to be used by individual task force members when evaluating firms. It was determined that if possible, interviews and deliberations should occur on the same day so as to give equal consideration to each firm. If necessary, additional time for reflection could be given through Sunday, August 2nd for a final selection. The interviews were conducted at Simpson House, in a manner that minimized overlap between design firms and enabled privacy. In addition to task force members, representatives from the Steering Committee and the Capital Campaign Committee were present to observe the process; however they were non-voting members and as such were not present for deliberations.

Of the three firms interviewed, the task force unanimously determined that one of the firms fell significantly short of our expectations, especially in comparison with the two others. Fortunately, the task force agreed we had two very strong candidates from which to choose. Both candidates understood our project goals, exceeded our qualifications criteria and presented proven, likable professionals. The firm selected for our project expressed interest in understanding who we are, our individual goals and our congregation. After a demonstration of how they would engage us in their design process, they clearly explained tasks to be performed during the twelve week Concept Design period. The firm's team conveyed that architecture can portray a mission or a vision and understood the value of this to our congregation. Based on their interview and our subsequent interactions, they are already providing excellent leadership. Final negotiations are underway to identify a scope of services and fees associated with the Conceptual Design effort. We anticipate introducing the architects to the congregation on Sunday, August 23rd at which time their efforts will begin.

To conclude our task force responsibilities, all archival documentation of the existing building and its subsequent renovations, the existing building systems reports, and the site survey will be remitted to the selected firm so that they can in turn make necessary copies. We have also solicited electronic files from the surveyor. During our final meeting on Sunday, August 9th, we finalized this summary report, accepted the scope and fee proposal from the architectural firm, finalized selections for the existing building evaluations and, in conjunction with the Steering Committee, determined which members have an interest in moving forward with the process, onto the ADTF, (Architectural Design Task Force).

It is possible that proposal costs may be exceeded during the course of the work of each firm as a result of several factors, such as unknown existing building conditions, a desired increase in scope of work or deliverables. Given the challenging twelve week

schedule, the ADTF should be in a position to authorize additional expenses quickly. Setting aside a contingency fund for potential expenses and establishing a maximum amount that the ADTF is pre-authorized to execute is strongly recommended. The task force also recommends executing contractual agreements with each firm that identifies the scope of work to be performed, fees associated with the work, terms and conditions. This will help to protect the interests of ASUUC and each firm in the event of a dispute, and identifies legal means for working through conflict.