



PROPOSAL FOR ARCHITECTURAL DESIGN SERVICES

THE GOODMAN GROUP & JBG DESIGN & DEVELOPMENT

SANDHILL SHORES
PHASE III OF THE LAKES AT STILLWATER

July 15, 2019



Bill Howell, Director of Operational Development JBG DESIGN & DEVELOPMENT 1107 Hazeltine Boulevard, Suite 200 Chaska, MN 55318

RE: SANDHILL SHORES

Dear Bill:

Thank you for the invitation to WAI Continuum to submit a proposal for your new project. In 2016, WAI was acquired by LJA and in 2019, we officially became LJA Minnesota. During this time there has been many exciting changes and growth for our firm and now we are pleased to submit the following proposal for design services as you grow your own campus with the new Sandhill Shores.

### Why Choose LJA Minnesota?

- **Dynamic Experience.** LJA Minnesota brings 38 years of specialization in senior living design, including independent living, affordable housing and marketable multi-family housing design.
- **Insightful Design.** Our strength is working on existing campus environments and incorporating emerging trends and bridging connections to promote resident interaction, staff efficiency and community activity.
- Engaged Stakeholders. Our emphasis on pre-design and program development ensures that your vision and project goals are fully understood and that the developing design holds to the approved program, schedule and budget through completion.
- Comprehensive Team. We maintain a full scope of architectural and engineering design services in-house, ensuring seamless design understanding from start to finish. Where a consultant was preferred, we have chosen an equally strong firm with whom we have worked on numerous similar projects, nationally and over several decades.
- Efficient Documents for Constructability. Our team prides itself on the organized work flow and review system we maintain, ensuring the efficient constructability of our drawings and the simplicity of understanding by the construction team.

We welcome the opportunity to speak with you in further detail about Sandhill Shores and how we can maximize your ideas for Phase III into an exciting, successful and lasting project. If you have any questions, please contact me at anytime.

Sincerest Regards, LJA MINNESOTA

Scott R. Koester, LEED AP skoester@lja-1.com (612) 240-8705

### **Project Understanding**

### **Statement of Understanding**

Based on the request for proposal, we understand the following:

- The 70 unit multi-family apartment building will be the third phase of development for The Lakes at Stillwater campus, which currently provides 139 units of independent, assisted and memory care living from Phase I and 30 lake home villas for independent living soon to enter construction.
- While the overall scale of finishes and design will be reduced, the **goal will be to maintain the look and feel of the already established aesthetic and design themes** from the Lodge.
- The three story building will include a unit mix of **one and two bedroom apartments** as well as a **heated underground parking** for seventy vehicles.
- The **program will include** business/leasing office and common areas which may include a library, fitness and social spaces.
- A **physical connection** between the proposed building and the existing Lodge may be incorporated.
- The Goodman Group's IT and Purchasing Division will specify technology systems including security, phone, wi-fi, low voltage, etc.
- Architectural design and structural engineering services will be included in this proposal with the understanding that mechanical/electrical will be completed through design/build.
- The deliverables and expectations outlined in the phases of your proposal are in line with our standard project scope. For items typically addressed by other team members (such as electrical engineers to provide a site photometric plan or mechanical engineers to define equipment strategy), we will base spatial design solutions on our experience with similar projects until those parameters are outlined.

### **Our Objectives for this Project**

With this understanding in mind, our proposal seeks to provide you with

- Marketable design solutions which reflect growing trends and market demands, including large units with open floor plans, emphasis on technology and security, kitchen peninsulas, community integration, etc.
- An engaging pre-design process which will fully explores your goals, needs and ideas for this building, as well as the phases already completed or in construction.
- Accurate cost estimates throughout the entire design process and an efficient constructible design that maximizes your budget.
- **Effective project management procedures** that reflect the importance of project scheduling, owner communication and cost efficiency.
- Solutions to adapt the look and feel of the campus to this building without over designing spaces or exceeding budget parameters.

### Firm Services and Staff

Founded in 1981, WAI Continuum's body of work in architectural design, spans across the nation and specialization in the full continuum of senior living, housing and aging care. In 2016, WAI Continuum was acquired by Lightowler Johnson Associates, Inc. (LJA), expanding its body of services to include land survey, mechanical, electrical, civil and structural engineering services, as well as additional insight into hospitality, government and commercial projects on which LJA commonly works.

In 2019, WAI Continuum was renamed LJA Minnesota to represent the shared strength and collaboration with the parent company and the new direction as a unified firm.

### A Seamless Set of Services.

Following is the standard scope of services typically available in-house by LJA. While this proposal will focus solely on our architectural design and structural engineering services, the collective team insight from all services is applied to our work.

### **Architectural Design**

- Project Visioning & Programming
- Master Planning
- Budgeting & Estimating
- Project Management & Coordination
- Building Design
- Construction Administration
- Renderings & Animation
- Repositioning & Feasibility Studies

### **Mechanical Engineering**

- Plumbing Design
- Heating, Ventilation, Air Conditioning Design
- · Geothermal Design
- Equipment Evaluations

### **Electrical Engineering**

- Equipment Evaluations
- Lighting Design
- Power Design

#### **Land Surveying**

- Mapping
- Topographic Surveys
- Boundary Surveys
- Construction Staking

### **Civil Engineering**

- Infrastructure Design
- · Underground Utility Design
- Storm Water Conveyance and Management Systems
- Sanitary Sewer Collection and Treatment
- Fire Water Protection Systems
- Design of Streets, Parking Lots, Walking Paths, Parks, Landscape Plazas

### **Structural Engineering**

- Footing & Foundation Plans
- Building Structural Design
- Condition Assessments
- Structural Restoration

### The Right People Make All the Difference.

Our proposed team includes senior level architects and project managers including a consultant with whom WAI Continuum has collaborated on numerous past projects over many decades. The focal point of our proposed team and its approach is the relationship between Goodman Group / JBG Design and our Project Principal, Scott Koester. As the Project Principal, Scott will work with you to ensure that your goals and objectives are explored, identified and understood. From there, our Project Manager, John Kolander, will lead the team and coordinate the activities of all participants involved on planning and design of this project.



Scott Koester LJA Minnesota Project Principal

With more than 35 years of management experience, Scott works in all phases of project development, collaborating with clients during programming and concept planning to coordinate the project objectives with budget and program. Scott also assists clients in addressing marketing studies, zoning and regulatory approvals, financing and control.

Education: BA, Business Administration

University of St. Thomas

Registration: LEED Accredited Professional

Associate AIA

### Project Experience:

- Primrose Retirement Villages, 25 Sites around US
- Forest Bay Lodge, Forest Lake, MN
- Northwoods Assisted Living, Escanaba, MI
- · Trailside Senior Living, Forest Lake, MN
- · Crystal Seasons Senior Living, Lake Crystal, MN
- · Victorian Heights, Crystal Falls, MI
- · Bethesda Homes, Willmar, MN
- · Christian Home, Waupon, WI
- · Pioneer Home, Fergus Falls, MN
- Markesan Resident Home, Markesan, WI
- · Celeste Hotel, Saint Paul, MN
- Best Western, Grand Rapids, MN



John Kolander, AIA, LEED LJA Project Manager

Joining LJA in 2019, John brings over 30 years of experience in all facets of the architectural and construction industry, including design/build, design only, expediting, interiors planning, architectural programming and project management. As the Project Manager, John will be responsible for the overall management of the project process, leading the project team and coordinate work between design and engineering disciplines, managing cost, schedule and quality control.

Education: Bachelor of Science, Architecture

California Polytechnic University A.A.S, Civil-Structural Technology Northeast WI Technical College

Registration: SD & MN Architecture License

LEED Accredited Professional

### Project Experience:

- Evangelical Good Samaritan Society (Design & Construction Consultant/Project Manager for IL, ND, SD, CO, MT, ID, WA, OR) Managed 67 projects executed over 5 years.
- · HUD Affordable Housing Darian, WI
- 112 Units of Duplex & Multi-Family Apartments -Menomonie Indian Tribe, WI
- · HUD Affordable Housing Darian, WI



Jude Hallamek, AIA LJA Minnesota Project Architect

Jude brings 20 years experience in site planning and architectural design. For this project, Jude will be responsible for the development and organization of the project, leading our technical staff in the completion of design development and necessary supporting documents. His focus is on developing an understanding of the client needs and desires to incorporate those expectations into a responsive, engaging and lasting built environment.

Education: Masters of Architecture, U of MN

Bachelor of Arts, U of MN

Registration: MN Architecture License #47835

NCARB #69306, plus licensure in

TX, AS, ND, SD

#### Recent Project Experience:

- Harrison Bay Senior Living, Mound, MN
- · Primrose Memory Care, Anderson, IN
- · Primrose Retirement Villages, Midland, MI
- Celeste Hotel, Saint Paul, MN
- · Fairfield Inn & Suites, Northfield, MN
- Mt. Olivet Careview Expansion, Minneapolis, MN
- · Fountain Springs Care Center, Rapid City, SD
- · Firesteel Care Center, Mitchell, SD
- Sunrise Place Adult Day Care, Saint Paul, MN
- Vermillion Shores Phase II, Hastings, MN
- Primrose Retirement Villages, Appleton, WI
- Colonial Acres, Golden Valley, MN
- Primrose Retirement Villages, Evansville, IN
- Station 37 Apartments, Fargo, ND



Douglas Hughes, PE Larson Engineering Structural Engineer

Larson Engineering & LJA Minnesota have a long history of project collaboration on senior related housing, including prior work with Doug as a sub-consultant.

Doug has extensive structural design experience in the areas of architectural and industrial design. He is knowledgeable of code requirements and readily accepts the challenges presented in project design. He has worked with architects, contractors and owners in the design of commercial, educational and industrial facilities and uses a variety of materials in his designs.

With over three decades of practical experience in the field of structural engineering, Doug has a keen eye for detail and understands industry demands and the importance of teamwork and project development.

Education: BCSE, University of North Dakota

Grand Forks, ND

University of Minnesota, Duluth

Registration: Minnesota Engineer License

(Structural - #20861)

### Project Experience:

- Primrose retirement Villages, Multiple Sites
- · Oaklawn Senior Care, Mankato, MN
- · LaSalle Plaza, Minneapolis, MN
- 1212 Washington Apartments, St. Cloud, MN
- Glen Oaks Apartments, St. Cloud, MN
- Woodbury Senior Housing, Woodbury, MN
- Dassel Lakeside Apartments, Dassel, MN
- · Windsor Oaks Apartments, St. Cloud, MN
- · Pleasant Seasons Senior Housing, Erskine, MN
- Paynesville Congregate Housing, Paynesville, MN

### What Sets Us Apart?

### Significant National Work with a Successful Track Record

Each client deserves a project team that understands the needs of the senior housing industry inside and out; a team that can hit the ground running. So, what should you know about our running shoes?

### We are Highly Specialized.

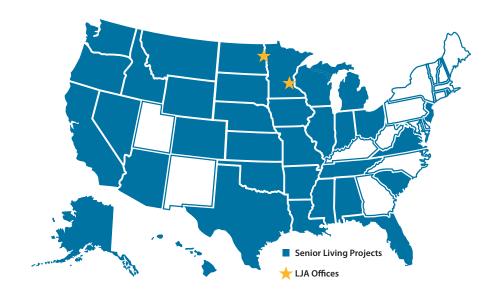
Unlike other firms that reduce their senior living projects to a single department, LJA Minnesota as a firm wholly **specialized in this industry for more than 35 years**. Our work has lead us from one ocean to the other, with designs for more than 550+ senior housing and care projects in both for profit and not for profit sectors around the nation.

This specialization has provided us with a vibrant portfolio of senior housing work, including:

- Independent and assisted living
- · Memory care healthcare and housing
- High acuity assisted living
- · Senior affordable housing
- Wellness and Intergenerational Day Centers

### We Maintain a National Portfolio.

LJA Minnesota embraces the belief that **best practices are lead and not followed**. Our in-depth work in senior living design on a national platform has allowed us to explore design solutions on a broad scale and **apply the experience and insight gained from national work to projects here at home** in Minnesota.



### We are Recognized Industry Leaders.

As a seasoned multi-faceted design firm, WAI Continuum has built an impeccable reputation of insightful creativity and seamless project management. Our principals have been recognized leaders in the field of housing design and strategic planning - serving as regular speakers at regional and national conferences on the topics of campus positioning, emerging trends and other industry advancements that address the evolution of housing in America. Recent presentations have included:

- 'Repositioning: Finding Enhanced Marketability & Profitability', FAHSA
- 'Creative Design Solutions on a Budget', Pioneer Network
- 'Emerging Trends in Today's Senior Environments', Aging Services of Minnesota
- 'The Future of Senior Living', University of Indiana
- 'Reposition Your Alzheimer's Environment & Program', Leading Age

**Our work is award winning** for its creativity and lasting responsive solutions that not only meet client objectives but further evolve the industry at large. Recent awards have recognized our designs for:

- Unit design and overall development in multi-housing.
- · Efficient project management during construction.
- Creative design for senior living and memory care environments.
- Well planned approach to foreseeing future needs of the organization and community.



Trailside: 2012 Best Development - Affordable Housing







Sisters: 2007 Senior Living Design

# TRAILSIDE SENIOR LIVING New Construction

Recognizing the growing need for affordable 55+ housing solutions dedicated to aging seniors, Trailside Senior Living offers an engaging and inviting environment through the warm, inviting decor features and numerous design enhancements not commonly found in affordable housing. Features include a vaulted dining space with broad window walls, fireplaces, wood accent details and multiple common areas for activities including a small commercial kitchen for special events, a large outdoor patio and walking paths.









### **Sponsor**

Washington County Housing & Redevelopment Authority

### **Project Scope**

70 Affordable Housing Units 35 One & 35 Two Bedroom Units

### Location

Forest Lake, MN

Recognized by the Minnesota Multi-Housing Association / MADACS Property Excellence Award for 2012 Best Development - Affordable Housing.

# PARK POINTE Design Development

Building upon a well established senior care campus, this newest phase adds independent living options to the continuum of care. With a connection to the ParkView Care Center, this new construction will offer easily accessible therapy and rehab programming through the new link, with a comprehensive wellness center, rooftop patio and town center offering open activity areas for resident socialization. Unit amenities include balcony, in-unit laundry and underground parking.

### Sponsor

Elim Care

### **Project Scope**

81 Independent Living Units

### Location

Buffalo, MN











# HARRISON BAY SENIOR LIVING New Construction

A new 72 unit senior living facility with common areas designed to support senior well-being and encourage social interaction with a sense of community. A variety of appealing amenities include a beverage bistro for casual conversation, community room for crafts & activities, a pub for socialization, fitness room, barber and beauty shop, exterior decks, tuck under garages, and community dining.



### **Sponsor**

**Trident Development** 

### **Project Scope**

52 Senior Living Units 20 Memory Care Units

#### Location

Mount, MN







### PIONEER HOUSE New Construction

Elim Home expanded an existing care campus to provide senior housing options. The new apartment building offers a two story common space, a private dining room for special family events, a parlor, access to physical therapy and a ministry center serving both the campus and the community at large.











**Sponsor** Elim Homes

**Project Scope**48 Independent Living Units

**Location** Fargo, ND

# PRIMROSE VILLAGES Multiple New Construction

After completion of 20+ senior living campuses nationwide from our designed prototype I model, it was time to evolve the prototype to address changing demographic demands, growth and market opportunities. The new model expanded to a third floor to accommodate more units where needed, a new component for memory care assisted living, a clubhouse component for the senior rental villa community and an updated interior program layout. Primrose continues to be a leading edge design that is frequently referenced by others in the industry as a go to model of success and an easily adaptable model to fit many national regions.



### **Sponsor**

Primrose Development

### **Standard Project Scope**

68 - 78 Independent & Assisted Living Units 24 Unit Memory Care Assisted Living Units Townhome Villas Clubhouse

#### Location

25 Sites Nationwide Including AK, AR, CO, IL, IN, IA, MT, NE, OH, OK, WI, WY









# Westwood Ridge New Construction

Looking to strengthen the market position of this existing senior living campus, a new senior living facility was added whose programming concentrated on rehab care. The \$9.7M construction offered 38 transitional care units, 24 memory care assisted living units plus 10 care suites. The program integrated a comprehensive therapy and wellness program with a medical clinic, restaurant and bistro style dining options, town hall space and various points of interest and activity.



### **Sponsor**

Walker Eldercare Services

### **Project Scope**

38 Rehab Care Units 24 Assisted Living Units 10 Care Suites

### Location

West Saint Paul, MN







## CRYSTAL SEASONS New Construction

This 64 units senior living facility implemented a forward thinking program that is designed to a higher code compliance. This allows for the facility to offer a high acuity of assisted living services with opportunity to convert to nursing care in some areas. The rich decor and structured interior is dynamic with numerous points of interest and activity for residents including a drop in cafe with personal liquor cabinets, beauty shop, spacious living room parlor, and winding corridors with art glass accented windows. The residential units are elegantly designed with sculpted archways, recess wall arches, breakfast serving counters, senior friendly appliances and spacious floor plans.





### **Sponsor**

Thro Company

### **Project Scope**

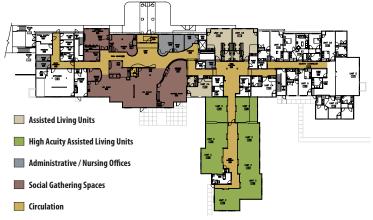
24 Independent Living Units22 Assisted Living Units8 Memory Care Living Units

### Location

Lake Crystal, MN







# CRYSTAL SEASONS New Construction

With the continued demand for affordable housing options, this senior care campus explored the replacement of an aging plant that currently offers Section 8, in favor of a new HUD 202 senior affordable housing project. Located within a residential neighborhood, the wrapping front porch, materials and massing are designed to fit within the surrounding structures. The project is slated for a future phase of development.





### KINGSWAY VILLAGE New Construction

A new senior housing facility, Kingsway features a dynamic program integrating community programs such as a restaurant, therapy and home health, Ratzkeller Pub, museum, convenience store and banking services. Residential amenities include balconies and facility underground parking.















### Sponsor

Lutheran Home Association

### **Project Scope**

45 Independent Living Units 22 Assisted Living Units 14 Memory Care Assisted Living Units

### Location

Belle Plaine, MN

### WHITE BEAR WOODS APARTMENTS **Remodel and New Construction**

Looking to better meet the needs of its multi-family residents and attract new tenants to the campus, this project greatly expanded the clubhouse to make way for a greater array of amenities and leasing operations, including a sizable community room, complete with full kitchen, interior/exterior fireplace and attached deck which overlooks the pool and natural landscape. A new billiard room, cyber station, fitness center, leasing offices, and exterior facade round off the space. In response to growing demand, studio apartments were also carved into in each of the existing four apartment buildings on campus.















### **Sponsor**

LaSalle Investment Management

### **Project Scope**

4,592 Sq. Ft. Clubhouse Studio Apartments in 4 Buildings

### Location

Lake Crystal, MN



Minnesota Multi Housing Association MADACS AWARD Recipient for 2009 BEST EFFICIENCY UNIT DESIGN & BEST PARTIAL RENOVATION

### **Scope of Work by Phase**

Following is a detailed scope of work which will guide this project through each phase of design and construction.

### **Architectural Design Services**

### **Pre-Design Phase**

We understand that the project will work with concepts and aesthetics identified in Phases I & II of The Lakes of Stillwater. As we move forward we will seek to explore and address the following questions as we further develop these plans.

- What are the 'big picture' issues?
  - What would best serve current needs?
  - What lies on the horizon for future residents and services?
- What is the focus of for 2030 and beyond?
  - How do we attract residents?
  - How do we adapt for flexibility and growth?
  - How do we ensure aging in place?
- · How can we integrate desired models? How can we ensure they meet financial goals?
  - How can campus components be best connected to each other?
  - Most importantly, how can options be created to allow the facilities to adapt and remain flexible. What are the results of each option?
- Provide input as to potential program opportunities and design enhancements which may reflect emerging trends, site or market opportunities.

### **Schematic Design Phase**

- · Assist in coordinating a final building program with the project team.
- Prepare general site plan showing:
  - Property line and dimensions
  - Contours, existing trees and buildings on site
  - General location of proposed building(s)
  - Vehicular access, circulation and parking
  - Available utilities
  - Easements, if any
  - Zoning set backs
  - Unusual site characteristics
  - Site amenity development

- Proposed site drainage
- Structures, roads, etc on property within 50 feet
- Develop building plans at a minimum scale of 1/8".
- Prepare sketch elevations showing massing and materials proposed.
- Develop written summaries of the proposed design areas, including:
  - General construction
  - Any unique features or concepts
- Includes 2 project team meetings.

### **Design Development Phase**

- · Prepare drawings showing major component locations for the building.
- · Prepare drawings showing the visual design intent for the building.
- Prepare brief report of contemplated construction scope, if requested.
- Formulate outline specifications, or preliminary edit of contract specifications.
- · Update coordination efforts of engineers.
- Coordinate with interior designer for material selections and overall design intent.
- Present scope of project and design intent to you for approval.
- Includes 1 project team meeting.

### **Construction Documents Phase**

- Prepare complete construction documents for architectural, structural, mechanical and electrical portion of the work.
- Assist in coordination with Building Code Officials as required.
- Assist in determining which, if any, construction procedures and techniques shall be submitted for review.
- Present completed construction documents for bidding to subcontractors.

### **Bidding Phase**

- Assist with pre-qualification of bidders/contractors
- Issuance of technical documents for clarification of addenda.

#### **Construction Administration Phase**

- Assist in establishing communications procedures with the construction team.
- Coordinate as necessary with code officials to secure building permits.
- Review submittals and shop drawings.

- Make two site visits each month to observe the quality and progress of the work, providing you
  with written memorandum of site visits.
- Review and approve contractor payment requests.

### **Post Construction Phase**

- Monitor and follow up punch list items for completion.
- Complete a post construction 10-month walk-through to monitor design and construction performance.

### **Structural Engineering**

### **Schematic Design Phase**

- Establish structural design criteria, including any special criteria you furnish.
- Provide structural criteria for use by geotechnical consultant.

### **Design Development Phase**

- Prepare preliminary foundation drawings based on recommendations set forth by the geotechnical consultant in the geotechnical report.
- Prepare preliminary structural design calculations for typical elements.
- Prepare preliminary designs and drawings showing layouts of typical areas and sizes of typical elements.
- Prepare typical detail sheets, as required.
- · Identify pre-engineered structural elements and prepare specifications for such items.
- Assist with preparation of opinion of a preliminary estimate of construction costs.
- Coordinate structural design with special design criteria.

### **Construction Documents Phase**

- Prepare the structural design of the primary structural system.
- Consider elements to be designed by specialty engineers, such as roof truss manufacturer.
- Consider secondary or non-structural elements.
- Assist in coordination with Building Code Officials, as required.
- Complete structural calculations and drawings.
- Prepare or edit specifications for the primary structural system.
- Assist in establishing testing and inspection requirements.

#### **Construction Administration Phase**

- Review of specified submittals pertaining to items designed by the structural engineer. Review
  of submittals shall be for general conformance with the information given and design concept
  expressed in the structural construction documents.
- Review submittals pertaining to pre-engineered structural elements specified by the structural
  engineer and design by specialty engineers. Review of pre-engineered structural elements shall be
  for type, position and connection to other elements within the Primary Structural System and for
  criteria and loads used for their design.
- Make site visits at appropriate stages of construction.
- Prepare site visit reports.
- Review reports from the testing and inspection agencies to determine if the agency has verified conformance of the reports item of work with structural construction documents.
- Initiate appropriate action in response to above identified items.

### **Deliverables**

### **Pre-Design**

- · Document summarizing updated program.
- Conceptual site and floor plans, potential exterior elevations.

### **Schematic Design Phase**

- Site, floor and code plans.
- Exterior elevations.
- Building systems statement and concept plans for mechanical, electrical and other building systems.
- Outline specifications.

### **Design Development Phase**

- Site, floor and code plans.
- Principle building exterior elevations.
- · Major building sections and typical wall sections and detail.
- 1/4" plans and elevations of typical, critical and special interior spaces.
- · Architectural and structural drawings.
- Preliminary energy analysis.
- Preliminary room finish schedule.

- Building area tabulation compared to schematic design.
- · Preliminary specifications.
- Other illustrative plans, elevations or perspectives requested for marketing purposes.

### **Construction Documents Phase**

- Final site, floor and code plans.
- Final building exterior elevations.
- Completed necessary building sections, wall sections and details.
- 1/4" plans and elevations of typical, critical and special interior spaces.
- · Completed structural drawings and specifications.
- · Final room finish schedule.

### **Construction Procurement Phase**

- Complete set of documents, including plans and specifications.
- Document addenda, if necessary, for substitution or change requests.

### **Construction Administration Phase**

- Evaluation and record of field site visits.
- · Minutes from regular and special construction team meetings.
- Responses to contractor Requests for Information.
- As built drawings for site, floor and code plans.

### **Fee Proposal**

Based upon the RFP and the project defined, we propose a lump sum fee of \$ to provide full architectural design and structural engineering services. Mechanical/electrical engineering will be provided through design/build and is not included in this proposal.

This fee includes two site visits per month during construction administration phase. It does not include reimbursable expenses (such as travel, long distance, reproduction of bidding documents, etc).

We will be focused to develop a plan that meet program and budget goals for the development. We will work proactively with the team and address value engineering items as proposed and identified. Should identified VE items require redesign from the originally programmed design/systems, LJA would submit a scope/cost to make these changes as affected to the architectural or structural plan.