



PROJECT WORK PLAN FOR

Indoor Sports Facility and Indoor Aquatic Facility Project

BerryDunn

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1.0 Introduction

This section of the plan provides a high-level background of the project as well as key terms and their definitions.

A. Project Background

The Grand Forks Park District (District) has retained BerryDunn to conduct feasibility studies for an indoor sports facility and an indoor aquatics facility. The District provides parks, facilities, and programming for the City of Grand Forks and the surrounding area and its system includes parks, rinks, arenas, athletic complexes, community centers, and golf courses. The District is interested in developing a 300,000 square foot (SF) indoor sports facility to host competitive soccer, football, lacrosse, running, basketball, volleyball, and more. Additionally, the District would like to determine if there is need for an indoor aquatic facility to host lessons, open swim, and competitive practices and meets. BerryDunn will complete both of these studies in one project, completing stakeholder engagement simultaneously to determine what District residents need.

This study will allow the District to determine:

- The best location for each facility
- Community needs and desires for indoor and competitive sports and aquatics
- Estimation of construction costs
- Estimation of operating costs.

BerryDunn will conduct a complete feasibility study including site analysis, indoor sports facility and aquatic facility development, operations and maintenance costs, funding mechanisms, financing opportunities and other funding alternatives, most cost effective operating model, and the most productive mixture of programs/facilities/amenities. This study will allow the District to determine the site’s potential to house the sports complex and other amenities that have been identified as being desired by the community.

B. Terms and Definitions

Table 1: Terms and Definitions

Term	Definition
BerryDunn	Berry Dunn McNeil & Parker, LLC
District	Grand Forks Park District, ND
PM	Project Manager
BRS	Barker Rinker Seacat Architects

Term	Definition
WTI	Water Technology Inc.

2. Scope of work

This section of the plan defines the scope of the project. It also summarizes the list of contract deliverables for each phase of the project and provides their estimated delivery dates. In addition, this section of the plan provides a high-level description of project activities.

A. Project Deliverables

This project consists of 15 core project deliverables. Table 2, below, lists each deliverable and its estimated delivery date.

Table 2: Project Deliverables

Deliverable	Estimated Delivery Date
Phase 1: Strategic Kickoff (SKO) and Determination of Critical Success Factors	
D1. Project Work Plan	
Phase 2: Public Input	
D2. Focus Group Meetings/Stakeholder Interview	
D3. Public Meetings	
D4. Statistically-valid Survey/Social Pinpoint	
Phase 3: Demographics Analysis	
D5. Demographics Analysis	
D6. Trends Analysis	
Phase 4: Site Analysis and Conceptual Plans	
D7. Site Analysis	
D8. Findings and Conceptual Plans	
Phase 5: Financial Assessment and Modeling	
D9. Construction Cost Estimating	
D10. Operational and Maintenance Budget Projections	
D11. Financial Pro Forma	
Phase 6: Draft and Final Plans and Presentations	
D12. Recommendations	

Deliverable	Estimated Delivery Date
D13. Draft Study	
D14. Final Study	

B. Project Work Plan Narrative

BerryDunn developed the following Project Work Plan to describe how we will meet the objectives set forth in the District’s Scope of Work.

Phase 1: Strategic Kickoff (SKO) and Determination of Critical Success Factors

1.1 Project Work Plan

Preceding the larger, team-wide kickoff, BerryDunn will review and outline the scope of services, engagement outline and schedule, project goals, timeline, and expectations.

Deliverable 1: Project Work Plan

1.2 Project Coordination

The BerryDunn project team will work closely with the District during Start-Up to identify key “Critical Success Factors” that will help ensure that this project is successful and achieves the desired level of involvement and outcomes.

The project team will review the details of the work plan at this virtual meeting, and will formalize the timeline and details of the project planning process including:

- Accepted methodologies and task processes
- Detailed project schedule and meetings
- Final methodology
- Expected quality and formats for deliverables
- Agreement on implementation strategies
- Identification and agreement on project “Critical Success Factors”.

1.3 Integration with Existing Planning Documents

As part of the information gathering phase, BerryDunn will integrate relevant previous and current planning work including the District’s Strategic Plan 2014- 2021 and any subsequent updates, park site master plans, previous community surveys, and from existing funding plans, budgets, and workplans into each Feasibility Study.

The BerryDunn project team will help the District to determine operational and maintenance costs, pricing and revenue opportunities, and staffing and operating structure for management of the indoor sports facility and the aquatics facility. BerryDunn will also evaluate existing information with regard to the political sensitivities and direction regarding provision of services for the community.

Phase 2: Public Input

After collecting background information, BerryDunn will schedule several opportunities for information gathering, conducting a top-level staff focus group, administration and leadership interviews, and meetings with the defined stakeholders, as determined during Strategic Kick-Off.

2.1 Staff and Stakeholder Engagement and Involvement

BerryDunn will conduct individual stakeholder interviews and several focus group meetings to solicit input on each proposed facility. The project team will engage potential user groups, District partners, District staff, members of the public, and others as determined during the Strategic Kickoff.

2.2 Citizen Involvement

Individual users, user groups, special interest organizations, associations, leagues, and other stakeholders will be given ample opportunity to participate in the feasibility study. The BerryDunn project team will explore knowledge of local issues and concerns that will assist us in producing useful and pertinent community feedback.

BerryDunn staff members are experienced and skilled facilitators, and will draw from a variety of methodologies that are designed to encourage and structure feedback for clearly identified and measurable outcomes.

Based on previous successes, the citizen involvement strategy approach is designed to assure residents, user groups, associations, neighboring communities, and other stakeholders that they are provided an opportunity to participate in the plan's development, and is recommended for this project:

- Initial Information Gathering: Collect information on awareness, use patterns, satisfaction, desires, barriers, vision, priorities, funding possibilities, and willingness to pay, to inform the development of the plan.
- A minimum of four (4) focus group meetings drawing from special interest individuals and groups, associations, other service providers (staff, schools, health clubs, youth and adult sports, local sports clubs, swim groups, seniors, etc .), open to the public at large . This method ensures a nucleus of participants with vested interest while also encouraging others to participate.
- Community-wide public meetings (4) to provide information and to validate and round out the qualitative information received from the focus groups.

- Stakeholder interviews with those who can contribute specific information in a more detailed manner (might include representatives from neighboring communities, sister agencies, District Board members, etc.).

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Deliverable 2: Focus Group Meetings / Stakeholder Interview

Deliverable 3: Public Meetings

2.3 Statistically-Valid Survey

As part of the quantitative needs assessment portion of the plan, the BerryDunn project team will conduct a randomly distributed survey using proven survey methods to achieve a statistically valid response.

This type of survey is the most effective method available to get the opinions of the non-users, as well as users of indoor sports programs and aquatics in your community.

The survey questions will be drafted based on survey design by RRC Associates (RRC) and BerryDunn/GreenPlay, as well as through SKO and appropriate input from other various sources. The project team will ask questions about what types of activities, facilities, and services residents and visitors want in their outdoor recreation systems, level of current usage, primary providers of services, alternative providers, quality and satisfaction levels with existing services and facilities, and willingness to pay for new services and facilities.

BerryDunn will work with RRC to create a carefully designed community survey to be distributed to a sample of residents using a list provided by the District (either registered voters or some other appropriate list). BerryDunn will invite survey participation using a mail survey with a postage paid return envelope provided, containing language that is proven based on work in other communities. The survey will permit respondents to complete the form and mail it back, or they would be directed to a web site where they could complete the survey on-line.

Following the initial invitation to complete the survey that is provided to a sampling of residents by mail, BerryDunn will offer the opportunity to go to an “open link” where the larger community, residents and non-residents would be encouraged to respond.

RRC typically tabulates the results from these two groups separately (the coded “invitation” and “open link” versions), but if they are similar in response patterns, they can then be combined for interpretation purposes. BerryDunn expects enough responses to permit outdoor recreation needs, use patterns and community priorities to be measured in a quantitative manner. To help improve response rates, the District should assist with marketing and creating public awareness of the survey through local channels such as social media, emails from the District, local newspapers, radio, cable TV, web sites, etc.

2.4 Social Pinpoint

BerryDunn will establish a Social Pinpoint online platform for the length of the project to solicit information from the public on many topics as well as keep the community informed of the project progress and information.

The District will create a tagline for the webpage as well as any customized logo for the BerryDunn team to use as a URL code and link is created. The District will be responsible for promoting the site and link to the public throughout the project.

Deliverable 4: Statistically-valid Survey/Social Pinpoint

Phase 3: Demographics and Trends Analysis

3.1 Demographics and Population Projections

BerryDunn will identify the constituency of the service area for the indoor sports facility and the aquatics facility through a demographic analysis and market profile, utilizing all information available from previous planning efforts and gathered from the District, the City of Grand Forks, the U.S. Census Bureau, Esri sources, and other national and local sources. The BerryDunn project team will work directly with District leadership to help document growth and redevelopment areas and land use changes.

A detailed demographic analysis based on service areas will outline trends and information that could affect the need for indoor recreation and aquatics programming, including competitive swimming.

Deliverable 5: Demographics Analysis

3.2 Trends Analysis

Strategic trends analysis will consider demographic shifts and their impact on future sports programming and tournament provisions provided by the indoor sports facility and the aquatics center. This analysis will also identify interest and participation levels for a variety of activities, will assess how services are provided through both administrative and planning trends, and will evaluate national and regional trends. This process includes strategic analysis of local, state, and national best practices and what is new in the field of competitive sports complexes.

Deliverable 6: Trends Analysis

Phase 4: Site Analysis and Conceptual Plans

4.1 Site Analysis and Ranking

BerryDunn team members will conduct a site analysis of up to three sites for the potential sports complex and the aquatics center to determine the optimal location for each facility. Each site analysis will identify the pros and cons of the site and an evaluation of how the site will affect the construction cost estimates and business plan.

The project team will evaluate the potential site locations based on aerial photos and site photography taken during the tours. Additional documentation (site survey, geotechnical information, etc.) for evaluation shall be provided by the client if to be included in the evaluation.

BerryDunn will recommend one potential site for continued conceptual development. The District will provide approval of the recommended site for further development. Conceptual development on multiple sites can be provided as an additional service.

Site planning and conceptual development will be provided on the preferred site including vehicular and pedestrian access and circulation, require parking and conceptual landscape design. All utility and infrastructure requirements to the preferred site shall be provided by the District. A detailed investigative analysis of the utilities and services to the preferred site would be an additional service.

Deliverable 7: Site Analysis

4.2 Findings, Visioning, and Facility Concepts

The BerryDunn project team will compile findings from the previous tasks and will prepare a summary of Findings Presentation for staff and decision makers in order to validate the accuracy of the findings. During this stage, BerryDunn will confirm that all information identified and collected thus far is correct and ask all stakeholders to share any additional issues or opportunities for consideration as we prepare to move forward into analysis and recommendations.

Following review of the findings, BerryDunn will facilitate a Visioning Strategies Workshop that will analyze all findings, political or historical constraints, and any other potential challenges. The project team will also identify opportunities for implementation steps, work plans, and funding implications.

This Workshop will help provide the amenities to include in the indoor sports complex and the indoor aquatics center.

The BerryDunn project team will utilize this information from the previous tasks, along with input from the staff and the District project team to verify that the proposed program elements for the indoor sports complex and the aquatics facility are appropriate. Design concepts will be created for the indoor sports facility and the aquatics facility.

The BerryDunn team will present a conceptual planning design for each indoor facility based on the preferred project site and the agreed upon indoor recreational space and aquatic priorities. Conceptual planning diagrams will be used to confirm program, scope, capacities, scale of the facility, space agencies, mechanical program and relationship to site access and amenities. Water Technology Inc. (WTI) will define pool zones, depths, turnover rates and select preliminary mechanical equipment, identify pool filtration, as well as heating and water treatment methodologies. Revised conceptual planning diagrams (one for each facility) and preliminary renderings will be provided for each facility (three total are assumed). Additional renderings can be provided as an additional service.

Deliverable 8: Findings and Conceptual Plans

Phase 5: Financial Assessment and Modeling

5.1 Construction Cost Estimating

BRS and WTI will develop construction cost estimates for both the sports and aquatic complexes for the final conceptual design signed off and approved by the District.

5.2 Annual Operational Budget Projections

Based on all of the information gathered and provided, BerryDunny will develop annual operational and maintenance budget projections to include all expenses and revenues associated with the facility. The projected operational and maintenance budgets will include (but will not be limited to) staffing levels, benefits, commodities, contractual services, and utilities taking into account hours of operation, and other key operating assumptions.

Revenue opportunities may include pricing strategies, rentals, concessions, team registration fees, program fees, merchandising, events, partnerships, sponsorships, cost recovery, and desired subsidy levels.

Fee structures will be based on the identified fees from daily use, rentals, and other factors determined during the comparative analysis. Revenue is estimated taking recommended fee schedules into account.

Deliverable 9: Construction Cost Estimating

Deliverable 10: Operational and Maintenance Budget Projections

5.3 Projected Pro-Forma

BerryDunn will create a five-year pro-forma projecting the expenses, revenues, and cost recovery anticipated over the next five years of operating the facility for each option. The pro-forma will be based on the operational budget projections as well as all the information provided by the agency.

These figures will project increases in participation as well as estimated inflationary costs and/or price changes.

Deliverable 11: Financial Pro Forma

Phase 6: Draft and Final Plans and Presentations

6.1 Recommendations, Implementation Strategies, and Draft Plan

After validating the Findings and conducting the Visioning Strategies Development Workshop in task 4.2, the BerryDunn project team will work to draft an easily understandable feasibility study report with a minimum of two recommended approaches and supporting analysis for developing and operating a sports complex at the proposed location.

Draft Feasibility Study Presentations will be presented at a second public meeting with the public and the District Board. Revisions, additional input, and recommendations will be incorporated into your final report.

A Draft Feasibility Study will be submitted for preliminary review, and all comments will be incorporated into your Final study. After the review, BerryDunn will assist in guiding the Study through any desired formal adoption process, including a meeting to present the Draft Study and/or for adoption of the Final Study.

For the Draft Feasibility Study we will provide the District with one (1) printed and bound color copy and one (1) electronic copy in a format compatible with existing software and for posting on District website.

For the Final Product we will provide the District with one (1) printed and bound color copy and an electronic copy in a format compatible with existing software and for posting on the website.

Deliverable 12: Recommendations

Deliverable 13: Draft Study

Deliverable 14: Final Study

3. Project Roles and Responsibilities

This section of the plan outlines the roles and responsibilities for the different project participant groups.

Table 3: BerryDunn Project Team Organization

Name/Role	Role Description
Project Principal Chad Snow, PMP®, CFE	As a principal and the leader of our Local Government Practice Group, Chad has overall responsibility for the services we will offer to the District. He will serve as a resource for the PM to help ensure the District’s satisfaction with our performance.
Engagement Manager Tom Diehl, MS CPRP	As engagement manager, Tom will oversee the BerryDunn team’s work and the services we provide, and he will work in collaboration with the BerryDunn and District teams to help ensure our services meet the District’s needs and BerryDunn’s high quality standards. In addition, she will provide subject matter expertise related to the indoor space visioning process and national indoor space trends.
Project Manager (PM) Pat O’Toole	As project manager, Pat will act as primary liaison with the District and be responsible for maintaining a constructive and clear line of communication between District staff and BerryDunn. He will monitor the progress of the project, track the initiation and completion of tasks and milestones, facilitate our meetings and information-gathering activities, and lead the development of project deliverables.
Project Consultant J.R. Clanton, MPA, MLS	As project consultant, J.R. will support the PM and provide direction on project tasks. He will also be responsible for researching, writing, assisting with site tours, data analysis, and conducting project coordination activities.
Additional BerryDunn Resources	If deemed appropriate, BerryDunn’s team may also include consultant(s) and/or senior consultant(s) from BerryDunn’s Government Consulting Group, which is composed of more than 180 personnel. These resources will support the project team with efforts relating to fact-finding, research, and deliverable development.

B. District's Project Team

The following table identifies the roles within the District project team and their related descriptions.

Table 4: District's Project Team Organization

Name/Role	Role Description
<p>Project Sponsor Grand Forks Park District Board</p>	<ul style="list-style-type: none"> • Provide executive support and sponsorship for the project • Provide overall direction and tactical vision for the project • Commit resources to the project • Participate in the relevant meetings, and emphasize project goals and objectives to District staff • Provide executive-level decision-making when needed
<p>Project Manager George Hellyer</p>	<ul style="list-style-type: none"> • Maintain overall responsibility for the project • Act as the main point of contact between BerryDunn and the District • Assist in collecting background documentation as well as coordinating meetings and District staff for web conference sessions • Circulate deliverables for review and collect feedback • Provide sign-off on deliverables
<p>Project Team (District to add)</p>	<ul style="list-style-type: none"> • Upload requested District data to the Knowledge Link site, or provide via email • Lead the BerryDunn team on facility tours • Assist in the review of project deliverables, when requested • Participate in relevant visioning meetings and any internal work sessions • Review the final recommendations, rankings, tool, and action plan, to ensure all meet the expected outcomes

4. Project Management Process

This section of the plan describes the processes that will be used to manage the overall project.

The Project Work Plan and Schedule provide guidance on the specific services and deliverables BerryDunn will provide. We will plan project meetings to meet specified objectives and make best use of attendees' time and expertise. BerryDunn's project team includes experienced group facilitators who have the skills necessary to develop buy-in and reach consensus in diverse groups of project participants.

The following subsections outline the specific project management processes for this engagement.

A. Scope Management

Section 2.0 (Scope of Work) describes the tasks, deliverables, and milestones that will be developed during the course of the project. It is important to establish and maintain an effective and collaborative working relationship. Changes within the overall scope of the project should be identified and made based on mutual agreement between BerryDunn and the District's project team. Regular communications should facilitate this process. Changes that amend the scope should be handled through the formal change provisions described in the contract.

We expect the District PM to approve any identified changes in scope or deliverable descriptions, in writing, prior to implementation.

B. Schedule Management

BerryDunn has assigned initial duration estimates for each high-level deliverable based upon expert judgment combined with analogous project experience. These estimates are defined in the Project Schedule and summarized in the Project Work Plan. However, as we refine the Project Schedule, we will refine estimated durations. The amount of reserve time built into each estimate is a function of the required review that is anticipated for the deliverable.

C. Communication Management

The BerryDunn project team will communicate project status updates to the District on an ongoing basis and as requested. Frequent communication and updates between BerryDunn and the District will be essential to helping ensure that all project objectives are achieved. BerryDunn expects to communicate regularly with the District PM and to keep District and BerryDunn members up to date on project progress. Project documents are available to authorized BerryDunn and District project team members via the District BerryDunn KnowledgeLink site. The District PM will coordinate with the BerryDunn PM to identify designated District personnel who should be given access to the BerryDunn KnowledgeLink site.

D. Risk Management

Risks are defined as known internal and external factors that might cause the project to be delayed, over budget, and/or unsuccessful. Project risk analysis is intended to establish a risk level and to determine any future actions that might be necessary. Risk statements are often associated with unrealistic or excessive constraints, invalid assumptions, or unresolved issues.

Risks related to the project will be brought to the attention of the District PM as required. The BerryDunn project team will develop risk mitigation plans as appropriate.

E. Quality Management

BerryDunn employs a three-step quality management process. This subsection describes each step that we will take to help ensure we provide high-quality deliverables the District.

Quality Planning

BerryDunn and the District will collaboratively define project quality standards. Once both parties approve the Project Work Plan, any changes to the quality standards should go through the change control process.

Quality Assurance

- BerryDunn will electronically submit deliverables to the District PM by close of business on the dates specified in the approved Project Schedule.
- By submitting a deliverable, BerryDunn represents that, to the best of its knowledge, the BerryDunn project team members have performed the associated tasks in a manner that should—in concert with other tasks—meet stated objectives.
- The District will formally communicate its acceptance and approval of the deliverable, in writing, to BerryDunn.

Quality Control

- Each BerryDunn deliverable will be reviewed by the BerryDunn staff members who developed the document and by the BerryDunn project team. Each deliverable will also be reviewed by BerryDunn staff during a formalized administrative proofing.
- By accepting a deliverable, the District PM represents that the deliverable has been reviewed and that the District PM detected no errors or omissions of sufficient gravity to warrant the withholding or denial of payment for the work completed.

5. Approval Parties

This section of the plan contains the approval parties for each project deliverable.

BerryDunn will submit the required deliverables specified in the Scope of Work to the designated parties for review and acceptance. The District's approval party is the District PM.

The District PM will notify BerryDunn, in writing, of their acceptance or rejection of said deliverables using the specific acceptance criteria in this document. A deliverable acceptance form signed by the District PM will indicate acceptance; a template of this form is included in Appendix A. BerryDunn shall acknowledge receipt of acceptance forms in writing.

Any rejection will include a written description of the deliverable defects. Upon receipt of such rejection, BerryDunn will act diligently to correct the specified defects and deliver an updated version of the deliverable to the District. The District PM will then notify BerryDunn, in writing, of the acceptance or rejection of the updated deliverable. Any such rejection will include a description of the way in which the updated deliverable fails to correct the previously reported deficiency.