



BOLTON & MENK

Real People. Real Solutions.

November 6, 2025

Project No.	25P.S00355.000
Project Name:	Apex Hughes Street Site
Client:	Town of Apex
Designated Representative	Marla Newman
Address:	73 Hunter Street Apex, NC 27502
Phone:	919-372-7458
Email:	Marla.Newman@apexnc.org

BOLTON & MENK INC	
Designated Representative	Allen Davis, AICP, CNU-A
Remit Payment Address:	1960 Premier Drive, Mankato, Minnesota, 56001
Phone:	980-249-6966
Email:	Allen.davis@bolton-menk.com

Attached:	Exhibit A – Fee Proposal for Professional Services Schedule 1– Schedule of Fees Exhibit B –Subconsultant- Market Study and Optimal Development Program
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Exhibit A – Fee Proposal for Professional Services 25P.S00355 – Planning and Design Services for the Hughes Street Site

November 6, 2025

☒ New Contract

☐ Amendment

To: Town of Apex

Attention: Marla Newman

Email: Marla.Newman@apexnc.org

Phone: (919) 372-7458

Bolton & Menk, Inc (“Consultant” or “Consultant Team”) is pleased to provide our proposal to Town of Apex (herein after referred to as the “Client”) for planning and design services in connection with development of the 13 acre property located at the corner of Hughes Street and Perry Road in Apex, NC. This proposal is based upon a project consisting of community engagement, municipal-initiated PUD rezoning, conceptual master planning, preliminary engineering, site program verification, and the initiation of a public-private partnership to select a site development partner.

Assumptions / Notes.

1. The Town of Apex is assumed to be both the property owner and rezoning applicant unless directed otherwise.
2. Site planning will be conducted for the purposes of establishing a vision and program for the site, and as an exhibit for a future rezoning application. More detailed site plan elements needed for approved development plans will be included in later phases of work.
3. The Town of Apex will obtain any required environmental reports (Phase I and II ESA, Geotechnical, etc) needed for future development phases.

Scope of Services

Task 1. Project Management

As part of our commitment to delivering a successful project, the Consultant will provide dedicated project management services to ensure all tasks are executed efficiently, on schedule, within budget. The Consultant will coordinate seamlessly across disciplines, maintain clear communication with stakeholders, and proactively manage timelines, resources, and deliverables to support a smooth and transparent planning process.

Deliverables

1. Project Management Plan
2. Project Schedule
3. Project Management Team Meetings (bi-weekly)
4. Kickoff Meeting (1)
5. Regular Progress Reports
6. Ongoing Coordination

Task 2. Market Study and Optimal Development Program (Subconsultant)

See attached subconsultant scope of services.

Task 3. Engagement

The Consultant Team will provide an integrated approach to streamlining efforts and ensuring continuity between public input and technical analysis.

Deliverables:

1. Engagement Plan
2. Internal Stakeholder Coordination and Consensus-Building
3. Online Engagement Campaign
 - Project Webpage – The Consultant will provide Town staff with content for publication on a Town of Apex webpage. This content may include project information, upcoming events, opportunities to get involved, and invitations for public comment. The webpage will be controlled, published, and updated by the Client. The Client will be responsible for generating webpage content following the conclusion of the project as defined in this document.
 - Social Media Updates - The Consultant will work with Town staff to determine regular discussion topics for the Hughes Street project to post on the Town's social media accounts. Social media will be used to showcase project events, direct people to information on the project web page, and create a space for people to provide comments and ask questions.
 - Online Surveys – The Consultant will create and post a survey on the project web page and promote it in different places like social media. The results will be summarized and presented to Town staff.
 - Online Comment Mapping using INPUTiD – Web based tool to gather community feedback through a visual, user-friendly mapping interface, allowing users to add points, provide comments, and upload attachments such as photos and documents.
4. One (1) Neighborhood Meeting / Open House
 - Designed to be proactive and demonstrate genuine interest in meaningful community involvement of the municipality as the applicant
 - Explain the project: timing, process, opportunities to engage, goals, etc.
 - Opportunity to provide input at the very beginning and for the team to identify and understand any key concerns right away
 - Specifically target adjacent residents, property owners, and stakeholders with special emphasis on engaging the residents of the Perry Farm neighborhood
5. Provide information for staff-led “Pop-ups” at Scheduled Community Events
 - Relevant information from the pop-ups will be provided to the Consultant
6. World Café
 - Consultant will design and facilitate a two-session World Café engagement process focused on presenting and discussing at least three distinct development alternatives.
 - Alternatives will be accompanied by relevant precedent imagery that may be carried forward into the rezoning package.
 - Client will assist with outreach and promotion to ensure broad and representative public participation.
 - Consultant will document participant feedback, themes, and preferences from each session and synthesize into a summary report.
 - Consultant will provide all materials, including printed development alternative sheets to facilitate discussion.
7. Stakeholder Concept Design Workshop
 - Focused ½ day session with Client and selected stakeholders, community members, organization representatives, etc. as identified throughout the community engagement processes.
 - Primary objective is to inform and/or provide feedback on the Conceptual Development Plan to finalize the preparation of the rezoning submittal.

Task 4. Conceptual Development Plan & Preliminary Engineering

The consultant team will create a site-specific conceptual development plan for the Hughes Street Site, tailored to its unique context, opportunities, and constraints. The plan will be based on community engagement, site fit studies, the client-driven site program (verified by the Market Analysis and Development Strategy), and any other sources of input deemed essential to shaping the development plan. The plan will integrate land use, urban design, infrastructure, and community input, and ensure a housing-focused, visually compelling, and context-sensitive site and building design. An entitlement strategy will also be created as part of this phase, which will set the work plan for the PUD rezoning process.

- A. Consultant will review and validate the plan submittal and approval process with the Town of Apex and develop a clear entitlement strategy for the site.
- B. Consultant will review and validate the Client-provided due diligence elements, including:
 - 1. Client-provided survey.
 - 2. Client-provided traffic impact analysis (TIA).
 - a. Consultant will be provided final TIA report to incorporate into the rezoning process.
 - b. Consultant to coordinate with Client pertaining project assumptions and all other relevant information necessary for the rezoning process.
 - 3. Client-provided provided site reports (geotechnical, environmental, traffic, etc.).
 - 4. Client-provided Rezoning Pre-application meeting included in the RFP
 - 5. Any previous site/architectural concept plans as provided by Client
 - 6. Jurisdictional codes, maps, and plans as related to:
 - Zoning
 - Transportation
 - Environmental Conditions (stream buffers, floodplain, watershed, etc.)
 - Water Service
 - Sanitary Sewer Service
 - Stormwater Drainage
 - Landscape Requirements
 - 7. Client-provided local water and sanitary sewer service utility Willingness to Serve for water and verified availability and capacity for service.
 - 8. Client-provided fire-hydrant flow test.
 - 9. Review of various additional data relevant and contributory to the success of the project.
- C. Consultant will prepare a Conceptual Master Plan to include:
 - 1. Land use bubble diagrams with acreage and approximate building square footage or number of lots.
 - 2. Building layout and approximate square footage, vehicular and pedestrian circulation, and open space/storm water management locations.
 - 3. Conceptual supportive illustrations/renderings.
- D. Consultant will prepare up to two (2) revisions of the Conceptual Master Plan based on Client comments. Any revisions above two (2) are not anticipated, but if required they would be billed hourly as an additional service. (Revisions noted here are not the same as revisions associated with review of Approval Bodies, as outlined in Task 6, section B, below.)
- E. Consultant will prepare Preliminary Engineering Plans using AutoCAD Civil 3D based on the final Client-approved Conceptual Master Plan to meet the requirements of the PUD rezoning package. (NOTE: Preliminary Engineering Plans will be conceptual in nature. Final grading, BMP design, invert elevations, pipe sizes and associated calculations will be determined during the Construction Document phase.)

Deliverables:

- 1. Entitlement Strategy
- 2. Conceptual Development Plan
- 3. Preliminary Engineering
- 4. Supportive Illustrations/Renderings (Digital 3-D Models and Perspectives)
- 5. Elements for the PUD Package

Task 5. Architectural Design Services in Support of Concept Plan and Rezoning (Subconsultant)

Subconsultant will provide Architectural Design Services to support site master planning for the site. This work shall be designed to comply with the 2024 NC State Building Code & Accessibility Code as adopted by the State of North Carolina. Bolton & Menk shall provide CAD and PDF files of the existing site conditions, as well as any proposed improvements, for review and use by the subconsultant for the work associated with this project.

The included Scope of Basic Professional Design Services is defined as follows; subconsultant shall provide Architectural Design Services only:

Conceptual Architectural Design:

- A. Participation in community and stakeholder engagement events.
- B. Review and coordination of master plans concepts and site layout options.
- C. Participation in design review meetings with project stakeholders.
- D. Participation in Neighborhood Meeting
- E. Research and provision of applicable building design precedents for use in community engagement and rezoning package
- F. Conceptual 3D design of proposed buildings based on client-provided site layout
 - 1. Includes up to two (2) design revisions in response to stakeholder feedback and/or rezoning process comments
- G. Digital architectural renderings based on stakeholder conceptual 3D design
 - 1. Includes one (1) aerial view, and up to (3) eye-level views
 - 2. Includes one (1) front and one (1) side elevation for each building type
 - 3. Includes up to one (1) revision to each provided view in response to stakeholder feedback and/or rezoning process comments
- H. Digital model file to be provided to Client (files can be locked for viewing only at the Consultants' discretion)

Deliverables:

- 1. Conceptual Architectural Design
- 2. Supportive Illustrations/Renderings (Digital 3-D Models and Perspectives)
- 3. Applicable Building Design Precedents for PUD Package

Task 6. Rezoning Process and PUD Package

- A. Consultant will coordinate with Client and Client's land use attorney to provide necessary rezoning documents to meet the requirements of the Town of Apex
 - 1. PUD Package
 - 2. Revisions per Approval Bodies
- B. Consultant will participate in the following meetings:
 - 1. One (1) required Preapplication Meeting
 - 2. One (1) Environmental Advisory Board (EAB) meeting
 - 3. One (1) Parks & Recreation Advisory Board (PRAB) meeting
 - 4. One (1) Multimodal Transportation Advisory Board (MTAB) meeting
 - 5. Four (4) TRC meetings
 - 6. Two required (2) neighborhood meetings (in addition to preliminary neighborhood meeting described in Engagement); One of the required neighborhood meetings must be in the month prior to the public hearing.
 - 7. Two (2) Planning Board meetings
 - 8. Two (2) Town Council meetings
- C. Consultant will prepare a Rezoning Site Plan/Technical Data Sheet and revise (up to three (3) based on Client and Approval Body comments)
- D. Consultant will prepare and submit written report(s) of the neighborhood meeting(s).
- E. Consultant will prepare presentation exhibits to be used in the public meetings

NOTE: While Consultant will participate in the public meetings, it is understood that a Client representative will be present and officially represent Client and Project in all public proceedings.

Task 7. Delivery Advisory Services

- A. Development Delivery Strategy.
 - 1. Evaluate and recommend a development delivery approach and identify appropriate sequencing of rezoning, procurement, and negotiation milestones.
 - 2. Align delivery approach with regulatory requirements for property disposition and town policies.
 - 3. Advise on timing of developer selection in relation to zoning, entitlement, and due diligence milestones.
 - 4. Track due diligence and feasibility analyses alongside the project team to identify property and project risks and pre-development considerations relevant to partner selection and private development.
 - 5. Monitor program development to incorporate expectations into the developer selection process.
 - 6. Analyze financial assumptions and funding structures in coordination with the project team.
 - 7. Coordinate with the Town's staff and planning and technical consultants to align RFQ preparation with the broader project schedule and deliverables.
 - 8. Identify legal or consultant support needs to support the town through developer engagement and project implementation.
- B. RFQ Preparation and Developer Selection and Engagement.
 - 1. Prepare a Request for Qualifications (RFQ) for development partner(s).
 - 2. Support review of respondent submissions, interview preparation, and evaluations as part of the developer selection process.
 - 3. Coordinate communication and documentation related to developer selection.
 - 4. Assist with engagement, onboarding, and early coordination of selected development partner(s).
 - 5. Outline near-term negotiation tasks and timing.

SERVICES, NOT LEGAL REPRESENTATION. One or more members of Innovate P3's team have a law degree and may be licensed to practice law in one or more jurisdictions. Innovate P3 advises the town that the services to be provided by Innovate P3 do not constitute legal services, and the relationship between Innovate P3 and the town shall not constitute an attorney-client relationship. The relationship between Innovate P3 and the town shall not provide the town with automatic protections inherent or implied in a client-lawyer relationship, such as (without limitation) the protection of client-lawyer confidences, the prohibition against a lawyer representing persons or entities with conflicting interests, and the obligation of a lawyer to maintain professional independence. Innovate P3 shall not be required to provide (and the town shall not interpret or rely on advice provided as) legal services, including providing legal advice or legal opinions, advocating legal positions on behalf of the town, drafting, or negotiating documents or contracts with any assurances or representations as to their legal effect, providing advice about legal rights, liabilities, or remedies, performing legal research, or providing legal interpretation or laws or regulations. The town shall obtain counsel for any matters requiring legal representation or advice. The consultant team will collaborate with the Town to define programmatic goals, assess financial viability, and tailor a delivery strategy aligned with local capabilities and regulatory requirements. This approach includes a detailed financial analysis to evaluate project feasibility, funding structures, and risk allocation.

Task 8. Exclusions/Additional Services

- A. Surveys and site reports (geotechnical, environmental, traffic, etc.).
- B. Traffic Impact Analysis
- C. Assist with the town's property disposition process (separate from the RFQ process) and preparation of supporting documentation.
- D. Support the preparation, review, or negotiation of business term sheets, development agreements, or disposition documents.
- E. Prepare additional RFQs for development partners if required by the delivery strategy.
- F. Assist with procuring additional professional service providers to support the town's project team.
- G. Providing ongoing implementation oversight, rescoping of developer requirements, and partner relationship management.

- H. Aerial or additional ground survey services not outlined in this scope (mapping, UAV flight footage, preparation of plats, as-builts, etc.).
- I. Written and other notification associated with public hearings as required by the rezoning process
- J. NCDOT traffic design coordination for public street or transportation improvements
- K. Interactive StoryMap/website for public engagement to compliment in-person engagement
- L. Wetland coordination, delineation or permitting not outlined in this scope.
- M. Preparation and execution of Lender Agreements (engineer's consent/certification, etc.).
- N. Administrative amendment or variance preparation, submittals, or consulting.
- O. Geotechnical or environmental services
- P. Architectural (detailed), structural, electrical, mechanical, or plumbing (including gas) design services beyond those outlined in this scope.
- Q. Public street or transportation improvements (turn/deceleration lanes, widenings, curb and drainage, signalization, etc.) identified in the TIA.
- R. Off-site utility improvements (stormwater drainage, water distribution, sanitary sewer, etc.).
- S. Global/regional drainage studies beyond the project limits, including flood studies.
- T. Preparation of cost estimates or quantity take-offs.
- U. Stormwater fee credit applications.
- V. Express permit review processes requiring designer attendance at review session.
- W. Architectural construction drawings
- X. Building signage design or coordination
- Y. Field verification or documentation of existing conditions for architectural design
- Z. Interior design
- AA. Structural Engineering
- BB. Tree conservation area study

The above-described services are not included under this agreement. Should these services be required in the future, a Task Order amendment may be prepared to cover the additional scope of work and associated fee.

Fee Summary

Fees valid for 30 days of proposal date

Task	Phase	Fee Type	Fee
1	Project Management	Lump Sum	\$36,000
2	Market Analysis / Program Verification	Lump (Sub)	\$22,000
3	Engagement	Hourly NTE	\$55,000
4	Conceptual Development Plan/Preliminary Engineering	Lump Sum	\$38,500
5	Architectural Services in Support of Concept Planning and Rezoning	Lump (Sub)	\$58,500
6	Rezoning Process and PUD Package	Lump Sum	\$62,700
7	Financial Analysis and Project Delivery	Lump (Sub)	\$35,000
8	Exclusions / Additional Services	Hourly	
Total			\$307,700

Signature

By signature below, Client confirms acceptance of the above-described Scope of Services and fee.



Subject to the Terms and Conditions and Hourly and Reimbursable Expense Rates included in the attached Professional Services Agreement.

Client: Town of Apex

By:

Print:

Title:

Date:



Subject to the Terms and Conditions and Hourly and Reimbursable Expense Rates of the original Agreement dated.

Bolton & Menk, Inc

By:

Print: Grant Meacci, PLA

Title: Principal

Date:

2025 SCHEDULE OF FEES

The following fee schedule is based upon competent, responsible professional services and is the minimum, below which adequate professional standards cannot be maintained. It is, therefore, to the advantage of both the professional and the client that fees be commensurate with the service rendered. Charges are based on hours spent at hourly rates in effect for the individuals performing the work. The hourly rates for principals and members of the staff vary according to skill and experience. The current specific billing rate for any individual can be provided upon request.

The fee schedule shall apply for the period through December 31, 2025. These rates may be adjusted annually thereafter to account for changed labor costs, inflation, or changed overhead conditions.

These rates include labor, general business, and other normal and customary expenses associated with operating a professional business. For projects with typical expenses and unless otherwise agreed, the above rates include vehicle and personal expenses, mileage, telephone, survey stakes, and routine expendable supplies; no separate charges will be made for these activities and materials. Expenses beyond typical project expenses, non-routine expenses, and expenses beyond the agreed scope of services, such as out of town travel expenses, long travel distances, large quantities of prints, extra report copies, outsourced graphics and photographic reproductions, document recording fees, outside professional and technical assistance, and other items of this general nature will be invoiced separately. Rates and charges do not include sales tax, if applicable.

Employee Classification	2025 Hourly Billing
Graduate Engineer	\$125-185
Design Engineer	\$125-196
Project Engineer	\$145-215
Senior Project Engineer	\$160-215
Project Manager	\$135-240
Senior Project Manager	\$188-273
Architect	\$186-267
Planner	\$125-168
Senior Planner	\$170-228
Landscape Designer	\$98-196
Landscape Architect	\$148-176
Senior Landscape Architect	\$160-268
Survey Technician ¹	\$90-196
Graduate Surveyor	\$122-190
Licensed Project Surveyor	\$180-225
Technician	\$75-182
Senior Technician	\$125-212
Administrative/Corporate Specialists	\$68-175
Specialist*	\$100-230
Practice Expert**	\$145-363
Principal**	\$175-316
Senior Principal**	\$218-333
GPS/Robotic Survey Equipment ¹	NO CHARGE
CAD/Computer Usage	NO CHARGE
Routine Office Supplies	NO CHARGE
Routine Photo Copying/Reproduction	NO CHARGE
Field Supplies/Survey Stakes & Equipment	NO CHARGE
Mileage	NO CHARGE

¹ No separate charges will be made for GPS or robotic total stations on Bolton & Menk, Inc. survey assignments; the cost of this equipment is included in the rates for survey technicians.

*Specialized role not classified above otherwise.

**Highly specialized and industry expertise unique to the market or area of discipline.

Attn: Name
Title, Bolton & Menk
Address

CommunityScale LLC
jeff@communityscale.com
61 James Street, Greenfield, MA 01301

October 22, 2025

RE: Apex Housing Market Study

[Bolton & Menk representative],

We are pleased to present this proposal to provide housing market study services to support Bolton & Menk's Hughes Street Master Plan project for the Town of Apex, NC. The following describes our scope of services, schedule, and fee.

Scope of services

Task 1 - Market study

CommunityScale will analyze demand-side demographic and employment trends to understand the market from the perspective of prospective tenants'/buyers' needs, preferences, and willingness to pay. The target market will include households currently living and working within the development's market area as well as potential new households attracted by employment opportunities across the region.

The market study will follow these steps:

1. **Target market area:** Based on commuting patterns, employment distribution, and related factors, define the geographic area from which the new development could draw tenants.
2. **Regional growth scenario:** Project 10-year household growth within the market area, either using CommunityScale's proprietary growth model or a locally preferred projection.
3. **Market demand:** Combining existing households with projected growth, estimate the number of households actively looking for housing within the target market area on an annual basis, subdivided by income.
4. **Housing preferences:** Based on empirical measurements of actual housing choices across the region, define the current market's prevailing housing preferences in terms of tenure and bedroom count.
5. **Willingness to pay:** Gauge household willingness to pay by income level within the region and tabulate market demand in terms of tenure, bedroom count, and price.

The market study will incorporate a housing demand assessment of the planned NC Children's Health Campus, including:

- Estimated mix of hospital employees by occupation and wages.
- Estimated housing demand profile of the hospital workforce, including likely housing types and price points employees would prefer and may seek locally and across the region.
- High-level assessment of the impact this new workforce will have on the local housing market, including how the Town may consider updating its recent Housing Plan's findings and outcomes to address needs and opportunities presented by this new development.

Task 2 - Optimal development program

Combining the market study with site-specific development parameters established by the project team, collaborators, stakeholders, and local residents, CommunityScale will recommend a development program optimized for market potential, affordability targets, and financial feasibility. This optimal program will provide recommended unit counts by type, size, bedroom count, and price point.

The development program will result from these steps:

1. **Design parameters:** Based on engineering and design studies, establish the site's overall development capacity and other constraints that inform the range of realistic unit counts building typologies.
2. **Revenue thresholds:** Coordinating with the team's development program formulation, establish minimum rent levels that must be met to achieve financial feasibility.
3. **Program scenarios:** Model development scenarios that test different configurations of unit types, sizes, and price points based on revenue thresholds and affordability targets.
4. **Absorption rate:** Incorporating market study data, estimate the likely absorption rate for select program scenarios, eliminating options that are unlikely to fill fast enough.
5. **Development program:** Based on the above analysis, define the optimal mix of unit types, sizes, and price points to achieve financial and affordability goals.

Schedule

CommunityScale can complete this project on whatever timeframe works best for the broader team. We recommend completing Task 1 - Market study earlier in the overall process and conducting Task 2 - Optimal development program in parallel with conceptual site design studies.

We look forward to supporting Bolton & Menk on this project.

Sincerely,
CommunityScale LLC



JEFF SAUSER

Principal and Project Manager
(404) 583-8735
jeff@communityscale.com