

Facilities Planning Committee
Approval of Grille Room & Ballroom Renovation Design/Build Contract
22 January 2026

Background

The Clubhouse Grille Room, Bar and Ballroom were originally opened in 1996 and were substantially remodeled approximately 2008-2010 that included: moving the bar from the back corner to the view windows; new ceilings and lighting including the ballroom chandeliers, aesthetic change from gold to brown; removal of a central fireplace that divided the room; and new furniture. The present look of the facilities has been in place for 15 to 18 years. In FY 2024/25 the Facilities Planning Committee (FPC) researched and developed space planning recommendations based on peak season use of facilities and an overall goal of maximizing the best daily use of all spaces. In an effort to minimize construction costs, for the Food & Beverage spaces, careful consideration was given to limiting wall and door relocations and creating layouts that meet Heritage Palms programming goals. The following guidelines were established for the Grille Room and Ballroom planning:

Grille Room

- Dining seating capacity: Existing 106; Proposed 118.
- Existing bar to remain as is. Bar seating capacity: Existing and proposed: 8.
- Overall footprint to remain as is.
- Retain a similar style of sliding door between Grille Room and Ballroom.
- Remove water feature and repurpose area.
- Provide new screening to kitchen access and restrooms.
- Provide flexible table arrangements with a mix of table sizes including booth seating at perimeter and centrally located large communal style dining table.
- Add “art style” television screens to the room to create flexible ambiances and increase revenues.
- Add climate controlled wine lockers and display.

Ballroom

- Dining capacity to remain as is. 240 with dance floor; 300 without dance floor.
- Remove existing dance floor and purchase a new portable floor that can be used in multiple locations.
- Add stand-alone bar with appropriate equipment to service ballroom events.

- Add ability to divide room with retractable operable partition or “air wall” for smaller events.
- Develop potential patio area and screening to provide opportunity for outdoor social functions with ballroom.
- Remodel stage and storage facilities.
- [Note] An audio-visual upgrade is being developed as a separate project.

Request for Proposal

The FPC researched 13 interior design firms in the fall of 2025, finalizing a list of 3 firms that were solicited based on their experience with clubhouse design, match to Heritage Palm’s style and culture, location in the Coachella Valley, and ability to work within HP’s schedule window and budget. The firms were interviewed and solicited by a request for proposal including a scope of work that included:

- Programming and Space Planning
- Concept Development
- Materials and Finish Selection
- Design Development
- Construction Documentation and Bid Procurement
- Implementation and Construction Oversight
- Post-construction Evaluation and Closeout

Recommendation

Castor Design Associates, Inc. (CDA) is the FPC design consultant recommendation for the project. They are a clubhouse interior design and architecture firm based in Rancho Mirage with over 40 years of experience and 375 clubs designed. Recent projects nearby include:

- Avondale Golf Club renovation very similar to our project and budget
- Toscana Country Club
- Springs Country Club
- Chaparral Country Club
- Indian Ridge Country Club
- Sunrise Country Club

CDA submitted a comprehensive Design/Build (D/B) proposal for the project with a preliminary budget and project schedule that meets our requirements.

The FPC recommends a D/B contract for the Grille Room and Ballroom renovation. This delivery method brings design and construction under one unified contract, with a single team

responsible for both envisioning and delivering the project. Instead of the traditional handoff between designer and contractor, the D/B team will collaborate with the FPC from the very beginning and throughout the project. This integrated approach allows ideas to be evaluated in real time for constructability, cost, and schedule, so decisions are made with a clear understanding of their practical impact. Budget is controlled through a collaborative process of value engineering. There is one point of accountability, communication is clearer, conflicts reduced and the project will move from concept to completion faster.

CDA proposes the following preliminary budget:

• Interior Design Professional Fees	\$28,500
• Renderings for presentation purposes	\$15,000
• Permits	\$2,500
• Grille Furniture, Fixtures & Equipment (FFE)	\$300,000*
• Grill Construction	\$115,000
• Ballroom FFE	\$330,000*
• Ballroom Construction	\$174,000
• Ballroom Bar Equipment	<u>\$35,000</u>
Total	\$1,000,000

*Includes all fees, sales tax, freight, warehousing, delivery/installation and applicable tariffs

CDA's compensation will be approximately:

• Interior Design Professional Fees	\$28,500
• FFE Procurement at 18%	<u>\$113,400</u>
Total	\$141,900
Est. percent of overall project budget	14.2%
• Reimbursements estimated at	\$500
• All permits and construction contracts	At Cost

Estimated Schedule:

• Schematic design and budget development	February
• Design development and final budget	March
• Construction documents	March
• Specifications and purchase orders	March/April
• Grille Room construction	Mid-May to Mid-July
• Ballroom construction	Mid-July to Mid-October

General Manager Joe Furlow and FPC Clubhouse team leader Nancy Croyle interviewed seven of CDA's recent project references and the Clubhouse team toured CDA's Avondale Country Club

project nearing completion. Avondale has a similar scope and budget to Heritage Palms' proposed assignment.

The FPC requests that the BOD approve a design/build contract with Castor Design Associates, Inc., including: professional fees of \$28,500.00; presentation renderings of \$15,000.00; eighteen percent (18%) fee on all furniture, fixtures and equipment; permits and construction contracts at cost; and reasonable reimbursable expenses for reproduction and presentation materials; the total not to exceed \$1,000,000.00 to be funded from the FPC reallocated scheduled reserves.



Castor Design Associates, Inc.
Clubhouse Interior Design & Architecture

January 15, 2026

Mr. Joe Furlow CCM ECM, General Manager

HERITAGE PALMS HOA/CC

44291 South Heritage Palms

Indio, CA 92201

Re: Heritage Palms Grille & Ballroom Renovation (rev. 2)

Dear Mr. Furlow,

Thank you for your request for Interior Design Services from Castor Design Associates. Based upon your request for proposal and program review we are pleased to submit the following outline of Scope of Services and Fees for **Heritage Palms HOA/CC**. Castor Design Associates would be happy to discuss the details of this proposal and our capabilities to perform on this intricate clubhouse renovation program.

Scope of Services:

- **Bar, Grille, and Wine Units**
- **Portable Bar and Storage Credenzas**
- **Corridor to Grille & Ballroom**
- **Ballroom and Ballroom Terrace**
- **Ballroom Bar and Service**

SCHEMATIC DESIGN PHASE

- Program **Heritage Palms** desired design direction and budget.
- Prepare preliminary interior base plan layouts.
- Develop preliminary space planning for scope of services listed above.
- Prepare furniture, decorative lighting, carpet, fabric, and millwork design direction.
- Develop a master color system for areas outlined in scope of services.
- Review schematic design with **Heritage Palms**.

DESIGN DEVELOPMENT PHASE

- Prepare design concepts, indicating types and quality of finishes, materials, and furnishings.
- Prepare, with **Heritage Palms** input, a detailed budget for the project in its entire scope, which includes construction quotes, decorative lighting, furnishings and finishes quotes, equipment; as well as casework and millwork drawings.
- Make design presentation(s) to **Heritage Palms** necessary for obtaining approval to proceed with the renovation program.
- Once approval is obtained for the areas in which to proceed, we shall provide furniture specifications, and purchasing & procurement services under separate contract per area.

CONSTRUCTION DOCUMENTS / CONSTRUCTION MANAGEMENT PHASE

- Develop detailed plans, including key elevations.
- Submit for Permit(s), as necessary.
- Oversee construction on-site implementation.
- Coordinate construction close-out.

Optional services:

- Castor Design can provide detailed digital presentation renderings for primary spaces at a rate of \$3,000.00 per rendering.

Excluded Services for the following:

(Note: These items *can* be provided if requested by the Club, with appropriate adjustments made to the compensation.)

- Design and/or selection of menus, uniforms, table settings, logos, and name studies.
- Design and/or selection of operational items, linens, tablecloths, housewares, etc.
- ADA compliance documentation beyond what is outlined in regulatory compliance documentation.

Purchasing/Procurement:

- Castor Design Associates shall provide purchasing and procurement to **Heritage Palms** for all furniture, carpeting, light fixtures, accessories, and artwork at a rate of **18%** above actual cost of subtotal excluding sales tax, freight, warehousing/delivery, and any applicable tariffs. This is provided under a separate purchasing invoice. FF&E invoice includes purchasing and procurement of all FF&E, as well as coordination of installation.

Compensation for Clubhouse Renovation Services shall be on a fixed fee, not to exceed basis for the previously indicated Scope of Services, excluding reimbursable expenses.

The fixed fee shall be broken down as follows:

Schematic Design Phase	\$ 9,000.00
Design Development Phase	\$ 11,000.00
Construction Documents/Management Phase	\$ 8,500.00
Renovation Fixed Fee Total	\$ 28,500.00

We shall invoice **Heritage Palms** for the compensation described herein in accordance with standard design project phasing. You will be billed for the time allocated to your project as outlined in this proposal. Reimbursable expenses include, but are not limited to, items such as reproductions, mailings, project binders, etc.

We **estimate** the reimbursable expenses related to the Services described herein to be:

Five Hundred Dollars **\$ 500.00**

LEGAL TERMS AND CONDITIONS

Termination Clauses

- Termination for Convenience: Either Party may terminate this Agreement without cause by providing 30 days written notice to the other Party. Client agrees to pay Designer for all services rendered and expenses incurred up to the effective date of termination, plus 25% of remaining contract value as a termination fee.
- Termination for Cause: If either Party materially breaches this Agreement and fails to cure such breach within 30 days of written notice, the non-breaching Party may terminate this Agreement immediately. Client shall pay Designer for all work completed, materials procured, and reasonable cancellation costs.

Change Order Clause

- Any alteration, addition, or deletion to the original scope of Services or budget (a 'Change Order') must be in writing, signed by both Client and Designer, and detail the changes to scope, cost, and timeline. No work outside the original scope shall commence until a signed Change Order is executed, becoming a binding amendment to this Agreement.

Dispute Resolution Clause

- Any dispute arising from this Agreement shall first be attempted to be resolved through good faith negotiation between senior representatives of each Party. If unresolved within 30 business days, the parties agree to submit the dispute to non-binding mediation. If mediation fails, the matter shall be resolved through binding arbitration in Indio, California with the arbitrator having expertise in design contracts.

Professional Liability Insurance

- Please note that Castor Design Associates maintains adequate professional liability and general commercial liability coverage. A Certificate of Insurance (COI) can be provided upon request.

This proposal is based upon our understanding of the scope of your project. At such time as you decide to proceed with the project as outlined herein, please sign one copy of the agreement, and submit a deposit of **\$5,000.00**, which will be applied to your schematic design fee. Schematic Design balance (\$4,000.00) shall be invoiced on March 1st, 2026. Design Development Phase (\$11,000.00) shall be invoiced in two equal payments of \$5,500.00 on April 1st, 2026 and May 1st, 2026. Construction Documents/Management Phase (\$8,500.00) shall be invoiced in two equal payments of \$4,250.00 on April 1st, 2026 and May 1st, 2026. Optional renderings shall be submitted under separate invoice. Payments are due upon receipt. Payments shall be made payable to **Castor Design Associates, Inc.** We look forward to working with **Heritage Palms** in the days ahead in developing a beautiful clubhouse design the members shall enjoy for years to come.

Signed By:

Timothy N. Castor

Timothy N. Castor, President
CASTOR DESIGN ASSOCIATES, INC.

Signed By:

Mr. Joe Furlow CCM ECM, General Manager
HERITAGE PALMS HOA / CC



Castor Design Associates, Inc.
Clubhouse Interior Design & Architecture

HERITAGE PALMS PRELIMINARY ESTIMATED BUDGET

\$1,000,000 Budget Allocated as follows:

Interior Design Professional Fees	\$ 28,500.00
Renderings (5 @ \$3,000)	\$ 15,000.00
Permits	\$ 2,500.00
Grille FFE	\$ 300,000.00*
Grille Construction	\$ 115,000.00
Ballroom FFE	\$ 330,000.00*
Ballroom Construction	\$ 174,000.00
<u>Ballroom Bar Equipment</u>	<u>\$ 35,000.00</u>
Fixed Fee Total	\$ 1,000,000.00

*Budget includes all fees, sales tax, freight, warehousing, delivery/installation, and applicable tariffs.



Project Timeline 2026

[illegible]