ATTACHMENT B

SCOPE OF SERVICES AND BUDGET

(1) Administration of and planning for the 706 Mission Street Residential Tower and Mexican Museum Project, consistent with the Museum’s approved Predevelopment Plan.

David J. de la Torre is The Mexican Museum’s Director. He will provide oversight of The Mexican Museum’s administrative and cultural participation in the 706 Mission Street Project. He will dedicate 25% of his time towards this administrative effort and will also be involved in other components of the 706 Mission Street Project as outlined in the other sections below.

De la Torre will be assisted administratively by Marlena Cannon and Sofia Trevino.

**Budget:**

<table>
<thead>
<tr>
<th>Role</th>
<th>Amount</th>
</tr>
</thead>
<tbody>
<tr>
<td>David J. de la Torre, Director (at 25%)</td>
<td>$22,500</td>
</tr>
<tr>
<td>Marlena Cannon, Assistant to the Director</td>
<td>$32,000</td>
</tr>
<tr>
<td>Sofia Trevino, Administrative Assistant</td>
<td>$21,900</td>
</tr>
<tr>
<td>Benefits at 20%</td>
<td>$22,500</td>
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<tr>
<td><strong>Total</strong></td>
<td><strong>$98,900</strong></td>
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</table>

(2) Financial Management of the 706 Mission Street Residential Tower and Mexican Museum Project.

**Budget:**

<table>
<thead>
<tr>
<th>Role</th>
<th>Amount</th>
</tr>
</thead>
<tbody>
<tr>
<td>David J. de la Torre, Director (at 5%)</td>
<td>$4,500</td>
</tr>
<tr>
<td>Bookkeeper/CPA</td>
<td>$20,000</td>
</tr>
<tr>
<td>Auditor</td>
<td>$20,000</td>
</tr>
<tr>
<td><strong>Total</strong></td>
<td><strong>$44,500</strong></td>
</tr>
</tbody>
</table>

**Milestones:**

- To generate quarterly reports for tracking of the expenditures for the grant.
- To generate annual report for reconciliation of all grant expenditures.

(3) Collections Assessment, Conservation and Cataloguing Plan in preparation for the move from Fort Mason Center to 706 Mission Street.

De la Torre will oversee the Collections Assessment, Conservation and Cataloguing Plan at 5% of his time. He will be assisted by Registrars Christine Osborn, Wendy Niles and Paloma Anoveros. An important component of this project is to digitize the Museum’s 14,000 works of art, many of which were done during Phase 1. Phase 2 will continue this digitizing. In addition, the team will work off-site at Ship Art International and at Atthowe Fine Arts Services where several of The Mexican Museum’s artworks are stored. Significant fees will be charged by the off-site storage companies for this service.

**Budget:**

<table>
<thead>
<tr>
<th>Role</th>
<th>Amount</th>
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</thead>
<tbody>
<tr>
<td>David J. de la Torre, Director (at 5%)</td>
<td>$4,500</td>
</tr>
<tr>
<td>Christine Osborn, Associate Registrar I</td>
<td>$30,000</td>
</tr>
<tr>
<td>Wendy Niles, Associate Registrar II</td>
<td>$30,000</td>
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</tbody>
</table>
Paloma Anoveros, Consulting Registrar: $50,000  
Digital Documentation/Web site collections access/IT: $21,000  
Ship Art/Atthowe Fine Arts Services Access to Collections: $50,000  
Total: $185,500  

Milestones:  
• Professional registrars will complete the inventory of the vault at Fort Mason, with a concentration on paper and textile collections. This will complete the 1st phase of the collections Inventory and Assessment.  
• The 2nd Phase of the collections Inventory and Assessment will verify that individual artifacts being stored off-site at Ship Art International (approximately 2,300 objects) and Atthowe Fine Arts (approximately 100 objects) have: (1) accurate catalog identification; (2) basic condition and conservation assessments; and, (3) records in the collections database with digital images.

(4) Fund-development for sustainability and capital campaign for 706 Mission Street Project.

David J. de la Torre will dedicate 15% of his time to fund-raising for the 706 Mission Street Project. He will be assisted by a Development Director and a Fundraising Counsel. A public relations consultant will be engaged to promote the Museum’s Fund Development and Sustainability. Additionally, The Mexican Museum will undertake a Familiarization Campaign and a Readiness Phase and Cultivation Process, which will: 1) publicize the Museum by building the Board; 2) publicize the Museum through a series of events at the Museum, in museum patron’s homes, and in the community; 3) interview selected people to begin to build additional support for the campaign leadership of the Museum; and 4) compilation of the compelling elements of the Mexican Museum into a refined “Adelante: Case Statement.”

Budget:  
David J. de la Torre, Director (at 15%): $13,500  
Development Director: $75,000  
Fundraising Counsel: $50,000  
Familiarization Campaign and Readiness Phase/Cultivation: $12,000  
Public Relations Consultant: $30,000  
Printing/Collaterals/Supplies: $10,600  
Total: $191,100  

Milestones:  
• To increase the visibility of the Museum through creating a series of written collateral, including print and video, and thereby attract more support for the Museum.  
• Build the Museum’s advisory boards, including the creation of an International Arts Council and Young Art Advocates Council.  
• Attract 3-5 new Board Trustees with ability to raise significant funds to help sustain the new facility.  
• Attract at least 100 new Builders Society Members who will become long term supporters of the Museum.  
• Launch an Estate Planning Giving Program for supporters to include the Mexican Museum as part of their estate planning vehicles.  
• Institute a formal Major Donors program.
(5) **Legal and Outreach Services**

Mr. Victor Marquez and the Marquez Law Group will provide legal and outreach services for the 706 Mission Street Project. These activities may include:

- Identification of all other necessary consultants and specialized legal counsel for the pre-development and the development/construction phase of the project; and
- Serving as lead counsel representing the Museum in securing project entitlements, lease negotiations for the future new facility and any future bond-reauthorizations; and
- Taking all necessary steps to hire the Museum’s Architect of Record, the Design Architect, and all related consultants.

**Budget:**

<table>
<thead>
<tr>
<th>The Marquez Law Group:</th>
<th>$80,000</th>
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<tbody>
<tr>
<td><strong>Total:</strong></td>
<td>$80,000</td>
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**Milestones:**

- Completion of entitlement process in conjunction with Millennium Partners.
- Draft and issue RFQs for the Museum’s architect of record and design architect.
- Finalize contracts for the Museum’s architect of record and design architect.

(6) **Project Manager, Architect of Record, Design Architect, Museum Planner, Program Planner**

Gregory Johnson is the Museum’s 706 Mission Street Project Manager. Mr. Johnson will be responsible for the overall management and coordination of the pre-development phase. Johnson will be assisted by the Museum Planner to ensure that the tenant improvements dovetail with the work of the Program Planner, who will review past and current documents related to the museum’s exhibitions and public programs, to ensure that the museum meets the current and future needs in serving the broadest public possible. Funding for Mr. Johnson’s position, the Museum Planner and the Program Manager is provided under the First Grant Disbursement Agreement.

The Architect of Record and the Design Architect will work on all aspects of the design process for the new museum.

**Budget:**

<table>
<thead>
<tr>
<th>Local Architect of Record;</th>
<th>$200,000</th>
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<tbody>
<tr>
<td>Enrique Norten, Design Architect:</td>
<td>$200,000</td>
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<tr>
<td><strong>Total:</strong></td>
<td>$400,000</td>
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**Milestones:**

- Completion of entitlement process in conjunction with Millennium Partners.
- Selection of Mexican Museum’s architect of record, design architect, and design team and finalization of agreements.
- Re-alignment of Museum’s building program and project narrative through a series of design workshops. Final deliverables will include a final Building Program, Project Narrative and Conceptual Design layout for the new Mexican Museum.
- Refinement of exterior design of the new Mexican Museum.
- Refinement of the projected operating pro forma for the Mexican Museum through 2018.
- Development of overall project schedule and construction budget.