

**Special Meeting  
Board of Trustees  
Coast Community College District**

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**Date:**        **March 27, 2012**

**Location:**   **Coast Community College District  
Board Conference Room  
1370 Adams Avenue  
Costa Mesa, California 92626**

**Time:**        **3:30 p.m.**

***A G E N D A   I T E M S***

***This Special Meeting is Taking Place for the Sole Purpose of Allowing Trustee Mary L. Hornbuckle to Meet with the Board of Trustees' Land Development Committee, Trustee Jerry Patterson and Trustee David Grant***

- 1.      Call to Order**
- 2.      Roll Call**
- 3.      Opportunity for Public Comment**

*Members of the public have the opportunity to address the Board of Trustees on any item that has been described in this notice, before or during consideration of the item. Persons wishing to make comments are allowed 5 minutes. A "Request to Address the Board of Trustees" card needs to be completed and filed with the Secretary of the Board of Trustees prior to speaking.*

- 4.      Discussion Concerning Land Development Opportunities**
- 5.      Update – Orange Coast College Recycling Center**
- 6.      Review Asset Management Proposals and Identify Firms to be Interviewed  
(Attachment 1, 2, 3, 4)**

- 7. Set Future Meeting Dates for the Board of Trustees' Land Development Committee**
- 8. Adjournment**

It is the intention of the Coast Community College District to comply with the Americans with Disabilities Act (ADA) in all respects. If, as an attendee or a participant at this meeting, you will need special assistance beyond what is normally provided, the Coast Community College District will attempt to accommodate you in every reasonable manner. Please contact the Secretary of the Board of Trustees, (714) 438-4848, at least as soon as possible to inform us of your particular needs so that appropriate accommodations may be made.

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# LAND DEVELOPMENT COMMITTEE AGENDA

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**Coast Community College District  
Special Meeting of the Land Development Committee\***

**Date: Tuesday March 27, 2012 at 3:30 p.m.**

**Board of Trustees Office Conference Room**

**1370 Adams Avenue, Costa Mesa, CA 92626**

- 1. Call to Order**
- 2. Roll Call**
- 3. Opportunity for Public Comment**

*At this time, members of the public have the opportunity to address the Land Development Committee on any item contained within this notice. Persons wishing to make comments are allowed five minutes per item.*

*Please note that the Committee cannot take action on any items not on the agenda, with certain exceptions as outlined in the Brown Act. Matters brought before the Committee that are not on the agenda may, at the Committee's discretion, be referred to staff or placed on the next agenda for Committee consideration.*

*The Committee requests that the public speak on matters which are on this agenda at the time that the item is considered by the Committee.*

*It is the intention of the Coast Community College District to comply with the Americans with Disabilities Acts (ADA) in all respects. If, as an attendee or a participant at this meeting, you will need special assistance beyond what is normally provided, the Coast Community College District will attempt to accommodate you in every reasonable manner. Please contact the Secretary of the Board of Trustees at (714) 438-4848, as soon as possible to inform us of your particular needs so that appropriate accommodations may be made*

- 4. Approval of Minutes – Special Meeting of February 16, 2012**
- 5. Update on Orange Coast College Recycling Center**
- 6. Review Asset Management Proposals and Identify Firms to be Interviewed (Attachment 1, 2, 3, 4)**
- 7. Set Future Meeting Dates**
- 8. Adjourn**

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*\*In order to comply with the provisions of the Ralph M. Brown Act open meeting law, the committee members and all meeting attendees must receive copies of any documents or presentations provided at the meeting. Please contact Veronica Arroyo in the Office of the Board of Trustees at 714-438-4609 prior to the meeting to facilitate the distribution of these documents.*

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*Public  
Private  
Ventures*

Coast Community College District  
Attn: Mr. John Eriksen  
Purchasing Department  
1370 Adams Avenue  
Costa Mesa, CA 92626

Ref: RFP # 2004 Advisory Services for Asset Management of District Owned Land

Dear Mr. Eriksen,

It gives us great pleasure to submit our qualifications to your district. We look forward to the opportunity of working with you on this important assignment. In addressing campus land in a pro-active and affirmative manner, (e.g. what can this land do to further our mission as a college), as is suggested in RFP #2004, the process enables the college and District to look at options in terms of revenue generation, campus-related land uses and businesses that are not otherwise available. Building support along the way will be important.

PPV looks forward to a long and successful relationship with the District and college, if chosen. We believe that forging a strong working relationship with our client is the key to project success. Our task is to test and help fulfill your vision.

In these challenging fiscal times, it is important to be searching for new sources of support and collaboration. We appreciate the opportunity to be considered for such an important effort.

Sincerely,

A handwritten signature in black ink, appearing to read "Jim Goodell", is written over a faint, rectangular stamp.

Jim Goodell  
President  
PPV, Inc.

Attachment 1

# Coast Colleges



COASTLINE  
COMMUNITY COLLEGE



GOLDEN WEST COLLEGE  
GWC  
HUNTINGTON BEACH, CA



ORANGE  
COAST  
COLLEGE

**Inspiration. Innovation. Graduation.**

## **ORANGE COAST COMMUNITY COLLEGE DISTRICT**

**REQUEST FOR PROPOSALS #2004**

**for**

**ADVISORY SERVICES FOR ASSET MANAGEMENT OF DISTRICT OWNED LAND**

**Dated November 28, 2011**

***Due Date: January 13, 2012 at 3:00 p.m.***

*Presented by:*

### ***PUBLIC PRIVATE VENTURES, INC ("PPV")***

***Location: 115 W. California Blvd., Suite 151, Pasadena, California 91105***

**Contact: James Goodell at (626)795-0919**

***Jim@publicprivateventures.net***

**Website: *www.publicprivageventures.net***



***Public  
Private  
Ventures***

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## **A. INTRODUCTION**

Public Private Ventures ("PPV") is pleased to submit our statement of qualifications and request to be considered by the District to provide real estate services to assist the District in developing a pro-active asset enhancement program to evaluate opportunities, plan, and manage the disposition of designated properties within the Orange Coast Community College District.

### **1. UNDERSTANDING THE ASSIGNMENT:**

**The Mission:** We understand that the District, in an effort to 1) evaluate the District's options and recommend a plan of action, 2), develop alternate and supplemental sources of revenues, 2) to create linkages to the surrounding community, and 3) to create housing to support and service the District's robust international student program, and 4, to facilitate the necessary agreements among public and private partners to achieve these objectives

**Scope of Services:** The work program will include a strategic overview and assessment of the District's current long-range Master Plan to identify opportunities and set priorities for public-private partnerships that will result in a more productive utilization of campus land, alternative financing structures, and the feasibility of various types of campus-related uses through a joint collaboration with the private sector and local agencies. The work will focus on assessing the feasibility of student housing and the creation of an environment with the college campus as the center of community life. A "pilot project" might include the development of student housing with a focus on the international student population, developed either as a direct development by the college utilizing bond financing, or as a ground-lease to a private development company.

**The Regulatory Environment:** PPV is fully aware that the complex regulatory requirements attached to community college real estate disposition and development. We have worked closely our clients and with the Chancellor's Office over the years to clarify and refine a workable and expeditious process. PPV has successfully navigated this process on behalf of numerous college clients. PPV has a long history of successful engagement with cities and other land regulatory agencies, both as advisors, and as proponent.

## **2. WHY PPV ?**

**Asset Value:** The Orange Coast Community College District sits on very valuable real estate assets. It rivals Silicon Valley in its economic vitality and the Riviera with its climate. Orange Coast District land has real, solid, fundamental asset value, and should be factored into the overall financing plan for the District. Asset management is not a quick fix and projects will be years in the making. However, it can become a source of ongoing revenue generation over the longer term by freeing up land for revenue producing uses, as parking is consolidated into structures, and core functions are consolidated into the most efficient configurations to create "partnership" or "entrepreneurial" parcels for revenue enhancement via third-party development .

**PPV's Role:** PPV's efforts encompass strategic, campus and business planning and program management. PPV is often described by our clients as their real estate "field general", responsible for strategic planning, implementation, and directing these efforts on behalf of the District and college administration and leadership. . For over 30 years, PPV principals have been pioneers and leaders in all facets of pro-active asset management on behalf of public and institutional land owners for land planning, zoning & regulations, project finance, redevelopment, private development and public-private real estate transactions of all types. Because real estate asset management impacts all facets of college life (i.e. fiscal, administration, facilities, academics, and as members of a greater community), PPV's role requires close collaboration with the "Client-Partner" at the highest levels, through formal and informal management protocol to insure mission "fit" and synergy.

**PPV's Unique Strength:** Our unique and critical strength is our deep understanding of the special world of California Community Colleges; their academic culture, the rules of order within the institution, their aversion to controversy and risk, the demand for transparency, as well as the arcane and complex asset disposition process as mandated by the State's Education Code. Our understanding has come from long years of experience, trial and error, and significant success. The lessons learned continue to make us more effective. Well-managed stakeholder engagement is essential to ultimate buy-in. Our depth of experience enables us to cut through to bottom-line questions, producing reliable strategies and options that address the District's unique opportunities.

**What PPV Clients Say:** We believe that most of our clients would agree with the thoughts of several of the systems finest administrators:

• **Steve Kinsella, President, Gavilan Community College District ...**

"Everything PPV does is 100% relevant to our goals and our mission as a college and to maximizing the assets we have. They are very professional and are respectful of our limited funds and their process is transparent. I see a clear path from where we've started to where we'll end up, and I'm confident of success."

• **Jerry Patton, President/Superintendent, College of the Desert ...**

"Working with experts like PPV who fully understand the mission and the value of community colleges is a tremendous advantage for us. Colleges bring so much synergism to the socio-economic development of a community, and knowing that PPV 'gets it' is essential to our success. We didn't have to spend any of our time educating them, so they were efficient and productive from day one. Combine PPV's knowledge of educational institutions with their deep experience in land planning, and we've got an unbeatable advocate. They are experts who could write a "how-to" book on land planning and campus development, and their insight is invaluable. Not only does PPV speak the language of the college, they are fluent in the languages of government agencies, developers, and neighborhood communities as well. They make excellent translators on our behalf and are really performing a great service for the entire community, as well."



• **Marie Kane, Superintendent/President (retired), Chaffey Community College District ...**

"I made contact with PPV, explained that we were looking for land and asked them to join the conversation and explore the possibilities. PPV, representing the state, invited me into the conversation. I'm glad they did, because we simply wouldn't be where we are today without PPV's involvement from the beginning. PPV added incredible value. PPV's participation was very, very important to the college because PPV understood the importance of a community college being part of a new planned development, and translated that advantage to the State of California and other parties at the table. PPV's strong political sophistication in this very complex project was absolutely essential to us, as well. As a result, from beginning to end we experienced a great camaraderie, an exceptional level of respect, open communication, and positive working relationships between the city, the state, the prison, and PPV. More importantly, I trust Jim, I trust PPV, and I trust their judgment."

• **JoAnne Kozberg, Secretary (retired), Department State & Consumer Affairs, State of CA ...**

"I retained PPV to assist the State of California by organizing an Urban Land Institute-like charette process. PPV accelerated the process and retained a first-rate group of knowledgeable experts who could look at all the problems of the site, hear all the issues of the constituents, and come up with a set of solutions. The result was a recommendation to convert the Camarillo site into the CSU Channel Islands campus, including the phased implementation of faculty and student housing. Throughout the process, PPV's leadership was invaluable. Responsive and articulate, they stayed in touch with me throughout to insure we worked within the State's parameters and that we maintained alignment and consensus. I've worked with PPV at varying times over the years and have always found them to be a superb professional and consensus builders. They listen well and come up with a set of potential solutions and then work very hard to bring all parties together to build consensus. I can't recommend Jim and PPV enough."

• **Edward Barnes, Vice Chancellor, California Polytechnic University, Pomona ...**

"In 1997, PPV worked with the university to prepare an asset development plan for the 1400-acre campus which has culminated in the successful development of Innovation Village, an 80-acre, 960,000 square-foot campus-linked research park. From the beginning, PPV's expertise and insight resulted in a stroke of genius that served us well throughout the project. It's been a fantastic experience for our college. Net present value of Innovation Village totals approximately \$100 million, with ever-increasing revenue streams anticipated for years to come. Having dollars available to leverage for discretionary spending creates opportunities for us to deliver on our mission in ways that will benefit our students, faculty and community for years to come. I very much recommend PPV and hope we can partner with them again in the future."

### **3. PPV APPROACH:**

PPV will work closely with the District to continuously refine the work program, and to develop and maintain the most effective reporting, management and decision-making protocol.

Our approach has evolved over 30 years of working on behalf of all levels of government, colleges, universities and other institutions to provide single point real estate services, from strategic planning to project implementation. PPV's primary role is to serve as advisor and manager to facilitate creative collaboration between the District and its colleges, the City, and private developer/operators. It is our belief that while a project will ultimately be developed by a highly qualified developer/operator in accordance with OCCCD's development standards, the pre-development work leading up to developer selection is more effectively undertaken by PPV, operating as advisor, project manager, and owners' representative to the District.

Developers are best able to function once the strategic and planning options are resolved and the program is defined and decided, giving them clear project parameters. PPV's approach integrates team collaboration with engagement of public officials and stakeholders to "build the story". Working with the District to draft the story and script the dialogue with the public is a critical component of the work program and one that sets PPV apart from the rest.

Based on our understating of Orange Coast College's current situation, we suggest the following three-phased process to land disposition and development:

**Phase 1: Preliminary Strategic Assessment:** The initial phase would focus on assessing site and development options throughout the District's real estate portfolio and its integration into the College's Master Plan. In this phase we would focus on process organization, project goals and objectives, decision-making protocols, and coordination with other consultants. This effort would result in a recommended approach and "plan to plan" that would form the basis for specific planning and entitlement efforts. This phase would identify and evaluate options, address City and community issues, and create a strategic plan to guide the disposition process. During Phase 1, we also inform the local marketplace (prospective developers, owners, brokers) that the District is moving forward in a systematic and disciplined way. In our experience, the ultimate, successful Developer/Partner has almost always been exposed to the project during Phase 1.

Specific tasks would include 1) Evaluation of the existing Master Plan, outlining options and concepts, 2) Evaluation of current real estate assets and facilities, 3) Evaluation of the college's current and projected student housing needs, demand characteristics, pricing, critical project sizing requirements and phasing 4) Preliminary discussions with student housing developers, owners, operators, and brokers to ascertain levels of interest, opinions of feasibility, and development concepts, 5) Determination of city requirements for entitlements and CEQA, and 6) Development of a 'Strategic Plan' with final recommendations.

The PPV team will want to work closely with the District's legal counsel from project inception to ensure seamless transition from initial planning to project negotiations and documentation.

***Estimated Duration: 90 – 180 days***

- *this phase provides the framework for entitlements and project implementation*

**Phase 2: Project Planning / Pre-Development:** This phase would develop the implementation plan for the designated pilot project, which at this time is anticipated to be a student housing project on surplus District land. Concurrently, PPV would manage project-related pre-development tasks, including preliminary market assessment, land use and product plan, preliminary entitlement agreements, identification of disposition parcels, design concepts, functional relationships to the campus, economic benefits to the college and District, financial feasibility, and market and community acceptance. Land use and development programs would be refined based on mission-related criteria including: mission "fit" and compatibility, revenue enhancement and/or cost reduction potential, enhanced quality of campus life, sustainability, and community compatibility. Risks to the District would be clearly identified and evaluated. The plan would need to be both clear and flexible in terms of timing of development of the various parcels. The pre-development work would be the basis for either a project to be developed, owned, financed and operated by the District, or the basis of a developer solicitation based on a ground-lease scenario. This phase would provide the framework for project implementation.

***Estimated Duration: 90 – 120 days.***

**Phase 3: Project Implementation and Program Development:** Upon authorization, PPV would proceed with the specific project(s) and would manage the implementation from plan to fruition. In the case of a District-developed and operated project, PPV would oversee and manage refinement the project plan, manage the design document process, oversee bond counsel, and assemble and direct a construction management team.

In the case of a developer solicitation for a ground lease, this phase would include preparation of the appropriate developer solicitation materials, management of the solicitation (RFQ/RFP) and election process, and negotiation assistance of the ultimate documentation (i.e. Developer Agreements and Ground Lease). PPV would manage conformance with Government and Ed Code procedural requirements and would work with the successful Lessee to secure all necessary City approvals for development and to ensure proactive and positive community relations.

PPV would coordinate and proactively manage on behalf of the District, all stakeholder relations throughout the disposition process. PPV will provide a more detailed description of typical project services at a higher level of detail upon request.

***Estimated Duration: TBD***

## **B. EXPERIENCE**

### **1. ABOUT PUBLIC PRIVATE VENTURES, INC. ("PPV"):**

PPV is an affiliation of seasoned and successful professionals who combine in-depth experience in all facets of asset development, with a track record of success in managing public-private real estate transactions on behalf of community colleges throughout California.

PPV, founded in the early 1980's, is a pioneer and leader in pro-active real estate asset management, acquiring and disposing of public and college real estate. PPV is a partner-advocate for its college clients, offering and managing the full array of services related to revenue enhancement, asset optimization, land development, acquisition and development, and program partnerships.

PPV principals have been the lead Asset Managers and Owners Representatives for over twenty (20) California Community College Districts, the State of California, Los Angeles and Orange Counties, numerous municipalities, including Costa Mesa, UC Davis, Cal Poly Pomona, CSU Channel Islands, and Art Center College of Design.

PPV has managed the disposition (by way of sale or ground lease) of over \$3 billion in public real estate assets over the past thirty years. While several of the projects described below resulted in fee sales, rather than ground leases, the basic process and keys to success of developing plans, soliciting offers, and negotiating the best possible value is very much the same in either case.

PPV has extensive experience and intimate knowledge of the Orange County and Southern California real estate development community, both public and private sectors. For further information regarding PPV, its projects and accolades, please visit the Portfolio and Accolades pages of PPV's website at: ***[www.publicprivateventures.net](http://www.publicprivateventures.net)***

### **2. RELEVANT PROJECT EXPERIENCE / PREVIOUS ENGAGEMENTS:**

PPV's experience over the past thirty years of daily practice is the bedrock of our approach, practice, and our work ethic. We believe that any asset development project stemming from this assignment with OCCCD will need to succeed in meeting three basic challenges:

- a. Create significant, stable and secure revenue streams from under-utilized real estate.
- b. Facilitate positive community connections.
- c. Create on-campus housing to support student life and attract new international students.

Several notable projects underscore PPV's ability to successfully meet these challenges. The projects noted below are described in greater detail on the PPV website at ***[www.publicprivateventures.net](http://www.publicprivateventures.net)***

#### **a) CREATING NEW REVENUE STREAMS:**

Since 1982, PPV principals have overseen and managed over \$3 billion in asset management transactions on behalf of public clients. **Several notable projects include:**

- **Cal Poly Pomona, Innovation Village, Pomona, CA:** PPV was responsible for planning and managing the initial implementation phase of the 80-acre, master-planned R & D Business Park and Incubator Center. Innovation Village currently includes over 960,000 sf of R & D, including Southern California Edison and the Red Cross as major R & D tenants. The project generates over \$3 million per year in ground-rent to the University. PPV helped secure a NASA Incubator capital grant.
- **UC Davis Medical Center, Davis, CA:** PPV was responsible for planning and disposition of property for the ground-lease development of a Marriott Residential Hotel geared to the needs of hospital out-patients. The hotel generates significant ground rent income.
- **Cal State Channel Islands, Camarillo, CA:** Initially on behalf of the Office of the Governor, and subsequently as advisor and program manager for CSU Channel Islands, to date 950 private residential units have been developed and sold, 1,200 beds of student housing have been constructed (with more on the way), and up to 400,000 sf of campus-related R & D (similar to Cal Poly's Innovation Village), is in the early stages of development. PPV co-authored the "University Financing District", which directs real estate taxes derived from university-related developments on campus land to the District which services over \$70 million in bonds sold to develop the campus.
- **West Valley Center, College of the Desert, Palm Springs, CA.** PPV managed the acquisition from the City of Palm Springs of a new 120-acre campus property at no cost to the District and successfully negotiated full development rights and entitlements for up to 250,000 sf of campus-related commercial development. The District will receive 50% of the real estate taxes received by the City for this development to support campus development and operations. PPV managed the ground-lease of 60-acres of the campus property for a solar photovoltaic field developed and operated by Southern California Edison.

**b) CREATING POSITIVE COMMUNITY CONNECTIONS:**

PPV pioneered the concept of "Campus-Centered Communities" (at existing campuses in built-up communities by creative re-use of underutilized land, and as featured amenities in master-planned new communities). The concept is to create "the college as a focal point of community life". PPV authored a white paper called "Campus-Centered Communities" that has been shared with many districts, the Chancellor's Office, CCLC and was presented to the Governor's Office. Representing public land agencies, PPV has been successful in securing development entitlements from local jurisdictions, including re-zonings, general plan amendments, and CEQA certifications. PPV principals have provided advisory and management services to over fifty municipalities, mostly in Southern California, and PPV has managed the development of integrated asset development plans for over twenty (20) community college campuses and centers, each creating opportunities for private sector development of a full spectrum of campus and community-serving uses, including student housing, active senior housing, faculty housing, R & D, office, incubator uses, and community-serving facilities.

**Notable projects include:**

- **Chaffey College Park Center, Chino, CA.** PPV was retained by the State of California to dispose of 840-acres of surplus land at the Chino Institute for Men. PPV prepared a master development plan centered on a new campus for Chaffey College, including 2,300 dwelling units and supporting commercial facilities. The community was named "College Park" and has been one of the most successful residential projects in the Inland Empire. Based on the plan, Chaffey successfully passed a bond and has constructed its first three classroom facilities at the new campus site. The City has created a 160-acre regional recreation center that shares athletic facilities and a community center with the college. The college is the center for community life at College Park.

- **Ohlone College, Fremont, CA.** PPV developed an asset management plan and secured City approval for the development of 12 prime acres for a mix of retail and residential uses that would serve the college and provide a catalyst for area-wide commercial revitalization. Similar asset development plans have been prepared and adopted at Pierce College, Gavilan, Kern, Desert, and the Antelope Valley Palmdale Center.

**c) CREATING CAMPUS HOUSING TO SUPPORT STUDENT LIFE:**

To date, there is little precedent for on-campus student housing at California Community Colleges. However, Orange Coast College is uniquely positioned due to its location, area demographics, and its established international student enrollment to support on-campus housing.

PPV principal John Gunn has successfully managed the development of student housing. He master planned and entitled 185-units of student housing for the Art Center College of Design in Pasadena, and was Managing Director for the development of University Gateway, an award-winning 1640-bed student housing facility at USC.

**Private Development Experience:** Goodell and Gunn also have extensive private sector development experience, primarily in multi-family, student and senior housing, office, retail, and mixed-use development. While at several private development companies, Gunn has managed or developed over 2,500 units of multi-family housing and over 4 million square feet of retail assets throughout California and Washington. Jim Goodell developed award-winning multifamily housing in California and Washington, and has managed the integration of on-campus student housing into Facilities Master Plans for eight campuses.

### **3. KEY INDIVIDUALS & SPECIFIC QUALIFICATIONS**

PPV will be represented by Jim Goodell (President & Principal-in-Charge), John Gunn (Project Manager), Allan Kotin (Ground Lease transaction), and Donald Brackenbush (Planner).

**a) JIM GOODELL (Principal-in-Charge – President):**

Jim will provide guidance and direct project involvement in strategic planning, program management, development planning and negotiations. Jim is a pioneer in representing public agencies (most recently on behalf of California Community Colleges) to pro-actively manage their real estate portfolios, including strategic land acquisitions and the disposition and development of surplus property. Jim specializes in strategic planning, master planning, project entitlements and the management of complex public-private projects. Over his thirty-year career, Jim has provided planning and development leadership and disposition services for over \$3 billion of underutilized real estate assets for a variety of public-private projects for the State of California, Los Angeles County, Orange Counties, University of California, the Cal State University system, numerous cities, and several health care institutions. Jim has authored over 50 redevelopment plans in California cities, often being retained long-term by his public clients to manage implementation efforts on their behalf. Jim's projects include the Third Street Promenade in Santa Monica, Downtown Long Beach, Downtown San Diego, and downtown Phoenix, AZ. As author of the Master Plan for Old Pasadena, President of the Pasadena Central Improvement Association, and as developer of seven of the earliest projects, Jim was a major force in the revitalization and redevelopment of Old Pasadena, one of the most successful, multiple award-winning programs of its kind in the country. Jim now oversees the revenue enhancement programs for more than twenty California community college districts.

Jim earned two Master of Arts degrees from the University of Pennsylvania, one in Architecture and one in City Planning, as well as a Bachelor of Arts degree in Architecture from the University of Nebraska. Jim is certified in the Executive Education Program at Harvard Business School and is affiliated with the Urban Land Institute (Trustee-Executive Committee-Public/Private Partnership Council), Chair-Los Angeles District Council; USC School of Policy, Planning and Development-Advisory Board; Lusk Center USC-Developer in Residence, 1991.

**b) JOHN GUNN (Project Principal - Program Manager):**

John will oversee and manage the PPV team's engagement on a day-to-day basis. John will direct the work program and will be responsible for coordination with the District team. John is a senior level executive with over 25 years experience in public/private, education-related, retail, multi-family, and mixed-use development having built, entitled and/or managed over 4 million square feet of retail and 2,500 units of multi-family throughout the western United States. John is a proven leader and integral team member with broad expertise in real estate development, investment analysis, strategic planning, feasibility, acquisition, disposition, entitlements, finance, asset management, marketing, design and construction.

As Owner's Representative for Art Center College of Design in Pasadena, John completed the college's 20-year campus master plan and managed the planning, acquisition, entitlement, design and construction of the college's 100,000 square foot, adaptive re-use, LEED "Gold" certified, "South Campus". As Vice President of Development for Pierce Education Properties, John was responsible for the acquisition, feasibility, design and construction of new ground-up and adaptive re-use student housing and education related buildings on a national platform. As the Managing Director of Urban Partners, LLC, John was responsible for the planning and development of complex, mixed-use, public/private, transit-oriented projects in urban locations throughout California and Washington, including over 1,400 units of multi-family and 200,000 square feet of retail assets, all of which were public/private. As EVP of The Hapsmith Company, John was responsible for a 3.5 million square foot retail portfolio. As a VP at Union Bank, John was responsible for underwriting over \$1 billion of real estate loans for multi-family and commercial developments throughout California.

John earned a Master of Real Estate Development degree from the University of Southern California and a Bachelor of Science Degree in Construction Management from the University of Washington. John is a licensed real estate broker in the state of California (DRE Lic. #01281065) and is affiliated with the International Council of Shopping Centers; Urban Land Institute; USC School of Policy, Planning and Development; and Lusk Center at USC.

**c) ALLAN KOTIN (Project Principal - Finance-Lease Structuring):**

Allen will be engaged on a focused, task-specific basis. Allan's 48 years of experience in structuring and negotiating ground leases on behalf of the County of Los Angeles, and numerous other public agencies will provide guidance and support in preparing the appropriate solicitation materials, and in evaluating and negotiating lease agreements. Allan has extensive experience in financial analysis, financial structuring, and transaction negotiation for public agencies and private clients. Acting on behalf of many public agencies, including Los Angeles, Ventura and Contra Costa Counties, BART, the MTA in Los Angeles, CSUN, Cerritos Community College and over 30 California cities. Allan's assignments have included development of asset management strategies, preparation of RFQ's and RFP's, sale-leaseback and lease-leaseback transactions, design-build agreements, developer selection, negotiation support, feasibility analysis, and identification and structuring of public and Public/Private financing mechanisms.

Allen's education includes B.A. and M.A. degrees in economics from UCLA and postgraduate study at Harvard. Allan has lectured widely on the subject of ground leasing of public land.

**d) DONALD BRACKENBUSH, AIA, AICP (Project Principal - Planning):**

Donald will help develop the Phase 1 master development plan to incorporate the appropriate planning, phasing, and development standards into the property solicitation materials. Donald is PPV's lead principal for master planning, design, engineering and the environmental aspects of all PPV projects. Donald brings over 30 years of executive experience to each assignment having served as Director of Planning for AC Martin Partners, West Coast Regional Manager for WRT, President of Ahmanson Land Company, and SVP in charge of planning and development for Home Savings. Donald worked on the asset development programs for CSU Channel Islands, Cal Poly Pomona, and the 850-acre campus-centered master planned community of College Park. Donald oversees PPV's work with several college districts, including Desert, Antelope Valley and Kern.

Donald earned a Masters of Planning and Architecture degree from the University of Pennsylvania, a Bachelors of Architectural Engineering from Ohio University, and is a licensed architect (CA & PA).

#### **4. UNIQUE QUALIFICATIONS:**

In summary, the PPV team is uniquely qualified to assist the District with this assignment based on the following factors:

- Strong network and presence in the California community college community;
- Fully integrated approach (Strategic Planning / Feasibility / Implementation);
- Each Project Principal has over 25 years relevant experience;
- Strong connection to the State Chancellor's office and Community College process;
- Extensive experience with 20 California Community Colleges;
- Working knowledge of the Orange County public and private sector real estate and development interests
- Experience with applicable government and Education Code provisions;
- Expert at working with local jurisdictions and communities;
- Entitlements, zoning, economic development, & entitlement processing background;
- Strong Retail, Multi-family, student & senior housing and mixed-use development;
- Expert in complex financial structuring (ground leases, etc.);
- Specialists in master planning, evaluation and strategic and management support.

**C. LOCATION:** PPV consultants are conveniently located in Pasadena, California at:  
**115 W. California Blvd., Suite 151, Pasadena, California 91105**

#### **D. COSTS / FEE SCHEUDLE:**

##### ***Hourly Billing Rates:***

- Principals at \$190/hour \*
- Associates at \$110/hour \*
- Technical Support at \$50-\$80/hour \*
- Direct project-related expenses are billed at cost (*no mark-up*)

\* Participation option:  
*PPV will condition payment of a portion of its fees to successful performance of the assignment*







LJP Construction Services  
9571 Irvine Center Drive  
Irvine, CA 92618  
Tel: 949.336.8900

[mlmckinley@ljpltd.com](mailto:mlmckinley@ljpltd.com)

**ADVISORY SERVICES FOR ASSET MANAGEMENT OF DISTRICT  
OWNED LAND**

**RFP # 2004 due Friday, January 13, 2012**

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## **Company Experience and Qualifications**

LJP Construction Services and its family of companies represent a team of project development and construction experts with a distinctive approach to building communities. With over 18 years experience as an industry leader in construction risk management, third-party peer review, quality assurance, sustainable building, and forensic investigation services, LJP Construction Services is uniquely qualified to assist public and private entities including school districts, municipalities, lenders, builders, developers, and receivers in risk management and asset protection.

Over the years and also prior to joining LJP Construction Services, its principals, officers and employees have successfully completed a wide variety of projects, including large single-family detached residential subdivisions and higher density, residential town homes and condominiums in urban areas. Our collective experience encompasses land acquisitions, complete governmental approvals, entitlement and permit processing, financial and lot premium analysis, grading, off-site and on-site construction, bond exoneration, model conversions and customer warranty service. We prepare detailed scopes of work and budgets, engage qualified trade partners in rigorous bidding processes, provide contracts execution and construction management, detailed project scheduling and quality control of all selected consultants (such as market research firms, architects, civil engineers, geo-technical/soils engineers, structural experts and a variety of trade contractors in all license specialties such as concrete, framing, plumbing, electrical, insulation, lath/plaster, drywall, roofing, landscaping, etc. and landscape architects).

All of our projects are staffed with building professionals and team members possessing extensive experience on similar product types. Our office procedures insure supplementary oversight by forensic architects and additional professional staff. Additionally, our innovative web-based technologies allow clients 24-hour access to their project updates and reports. The LJP Construction Services team prides itself on providing responsive, client-focused service for each of our agencies. Our combined team has a long list of thoroughly satisfied clients that includes the most reputable builders, developers, law firms, insurance companies, and financial institutions.

## **Introduction to LJP Construction Services**

LJP Construction Services is your single-source solution provider for all risk management, asset protection, construction management, and real estate consulting needs:

**Asset Management** ensures your property achieves its highest and best use possible, including providing building and landscape analysis for risk management, detailed off-site/on-site purchasing, scheduling, construction management, customer service/warranty administration, and complete reconstruction management representing owners' and financial institutions' real property interests.

**Property Assessments/Existing Conditions Reports** provide a thorough written and photographic analysis of building interior and exterior elements as needed, allowing for accurate repositioning of the property. Documentation may also include photographic evidence of project boundaries and existing baseline conditions of all perimeter buildings and landscape improvements.

**Construction & Project Management Services** including comprehensive development budgets, feasibility studies, detailed off-site/on-site purchasing, and construction management, while simultaneously coordinating with lenders, receivers, and trustees to maximize asset values.

**Green/Sustainable Building Consulting** helps guide our clients through the course of their project. Our experience working with all of the major voluntary green building programs allows us to evaluate, provide education and independent verification regarding green assemblies.

**Fund Control** verifies loan draw amounts relative to field construction progress and provides a photographic record of project status at time of draw request. Our third party verification then allows for disbursement of funds to the general contractor, receiver, and/or trustee for work completed.

**Reserve Studies** provide a physical analysis, including estimated remaining useful life, of the common area components the association is obligated to maintain, helping to anticipate and prepare for major repairs and replacement costs.

## Project Team Resumes

LJP will develop a team that encompasses key industry professionals that possess the talent to brainstorm and assess the needs of Coast Community Colleges and formulate strategies to ensure all goals are met. The time spent on the project will be determined once the parameters of the project have been set and the team assembled. The immediate personnel to assemble this team will be:

**Don Neff, President,** has over 30 years of experience in the real estate industry covering planning, land acquisitions, real estate development, construction, and management. Prior to founding D.R.R. Neff & Associates in 1993 (and incorporating as La Jolla Pacific, Ltd. in 1995), he was a Vice President at Woodcrest Development. His responsibilities included development of eight tracts encompassing 1000 homes (including entitlements, construction of off-sites, on-sites, warranty service, and bond exoneration) representing construction costs in excess of \$75 million (1990 Dollars). At that time, Woodcrest was the fourth largest homebuilder in Southern California with divisions in Orange, San Diego, and Riverside Counties.

Mr. Neff's previous positions include Project Manager at Thomas Brothers Development Corporation (Irvine), where he was responsible for the acquisition and development of both conventionally financed market rate multi-family residential and senior subsidized rental housing under programs of the U.S. Farmers Home Administration. At Consolidated Capital (San Francisco) he was a Vice President directly involved with development feasibility, syndication, and asset management of residential, commercial, and industrial land holdings in five national markets (Florida, Texas, Utah, Oregon and California). During his time at First Winthrop Corporation (Boston), Mr. Neff served initially as a Financial Analyst and later as Assistant Vice President directly involved with the analysis, acquisition, syndication, and management of citrus properties. With his assistance, Winthrop purchased and syndicated citrus properties with a total market capitalization in excess of \$50 million (1985 Dollars). Winthrop was also a major owner of apartment projects controlling approximately 45,000 units.

Mr. Neff holds a Master's Degree in City Planning from Harvard University (Kennedy School of Government), with a Concentration in Real Estate Finance, Development, and Management and additional supporting business school and civil engineering course work taken at Massachusetts Institute of Technology. He also holds a Bachelor's Degree in City Planning from Western Washington University. Actively involved in the Building Industry Association, he has conducted numerous educational and training seminars focused on building a better quality product for benefit of homebuilders and trade contractors. Mr. Neff teaches Construction Operations at the University of California, Irvine, is an ICC Certified Building Inspector, ICC Certified Plans Examiner, Certified Green Building Professional in good standing, a LEED-AP, and has completed the Expert Witness Certificate Program at California State University, Long Beach. Mr. Neff also holds Building Contractor Licenses in good standing within California and Nevada.

**Dan Reeve, Senior Vice President**, has over thirteen years of both senior management and commercial and residential construction management experience, ranging from high-end wood-framed condos to concrete tilt-up projects. Mr. Reeve currently oversees LJP Construction Services' Pre-construction, During-construction and Post-construction teams, encompassing all of the company's consulting services.

Prior to joining LJP Construction Services, Mr. Reeve worked for Layton Construction, a prominent commercial general contracting firm in both Arizona and Utah. There, he gained extensive experience as a project manager, project engineer, and business development manager while demonstrating his ability to deliver an extremely high-quality project on time and under budget.

Mr. Reeve's most recent experience prior to joining LJP Construction Services in 2004 included managing construction for Marriott's new timeshare resorts. He has also managed the construction of various concrete tilt-up facilities, including a complex Emergency Operations Center for the Salt Lake County Fire Department. This facility was the center for security efforts during the 2002 Winter Olympic Games in Salt Lake City. Other projects he managed include a \$108 million dollar concrete detention facility, two Class A office buildings totaling 180,000 sf, a surgical center tenant improvement, and an exotic car dealership. As a business development manager, he was successful in generating new business in the office development market as well as with various universities and school districts. His duties also included leading proposal teams and managing the estimating and marketing efforts for project proposals.

Mr. Reeve holds a Bachelor's of Science degree and a Minor in Business Management from Brigham Young University, where he also served as chapter president for the university's Associated General Contractor's (AGC) chapter. He is an Eagle Scout and spent 2 years doing volunteer missionary work for his Church in Romania and Hungary.

**Jonas Denny, Architect & Director of Pre-Construction Services**, brings over 12 years of construction, architecture, and engineering related experience to the team at LJP Construction Services. Mr. Denny currently serves as our Director of Pre-Construction Services, overseeing all aspects of high-rise, podium, and detached product plan and specification reviews.

His prior positions include several highly regarded architectural and engineering firms in Florida and Alabama with job responsibilities including design layout, ADA and code research, field inspections, design and production of project drawings (architectural, civil, structural, and mechanical), permitting, mechanical calculations, and creation of structural details. Projects in which Mr. Denny was involved include large multi-million dollar parking decks, industrial, apartment complexes, hotels, gas stations, restaurants, boat docks and piers, custom homes, and large multi-family structures.

Mr. Denny is a licensed Architect (NCARB) and received his Bachelors Degree in Architecture with a minor in Business from Auburn University. He is also a Certified HERS Rater, GreenPoint Rater, and a Certified Green Building Professional.

**MSA Land Solutions, Inc.**  
**30854 Hamilton Trail**  
**Trabuco Canyon, CA 92679**

**Mark S. Anderson**

**Registration:** 1976, Civil Engineer, 26821(CA)

**Education:** B.S., 1974 Civil Engineering, California State Polytechnic University,  
Pomona

**Professional Accomplishments:**

Past President, Consulting Engineers & Land Surveyors of California, Orange County Chapter

"Distinguished Alumnus" Honor, California State Polytechnic University, Pomona

"Engineer of the Year", ASCE

Past Board Member, Orange County Building Industry Association

Board Member, Foothill Trabuco Specific Plan Review Board

Past Member, Orange County Development Processing Review Committee

**Current & Recent Projects:**

**Santiago Canyon College** – As lead civil engineer, assisting Project Architect, provided grading design and preparation of improvement plans for storm drain, sewer, water and roadway facilities implementing new campus master plan. Scope included review of available but dated record drawings with field confirmation when possible. The design contemplated phased construction to accommodate and maintain normal school sessions and hours.

**City of Lake Forest** – Assist city staff with the evaluation of application for tentative tract maps that includes review of geotechnical reports, drainage reports, site planning, grading design and compliance with environmental regulations.

**Huntington Beach City School District** – Lead civil engineer evaluating the potential to exchange land with the City of Huntington Beach resulting in a newly configured park for the City and for sale residential lots for the District. Scope includes infrastructure evaluation, site planning and preparation of tentative tract map.

**County of Orange** – The County owns a parcel (approximately 1600 acres) which is now "excess" following completion of the Seven Oaks Dam. To achieve the highest return for the tax payers, the County has retained a team of consultants to obtain zoning and environmental clearance for a new residential community of over 3,000 units. Mr. Anderson is lead civil engineer providing site planning, grading design and master plans for roadway, drainage, sewer and water improvements.

**MSA Land Solutions, Inc. Services:** Bond Exoneration – Constructability Review – Construction Support – Cost Estimating – Expert Witness/Litigation Support – Land Development – Program/Project Management – Property/Project Due Diligence – Scheduling – SWPPP Review and Compliance – Value Engineering

**Marty Price, Architect**, has over 30 years experience in architecture, structural engineering, code enforcement and plan review with both public agencies and private consulting firms. He currently serves as a Project Architect for LJP Construction Services' Pre-Construction Team conducting plan reviews and specifications.

Prior to joining LJP, Mr. Price was a Fire Protection Engineer with the Santa Rosa Fire Department/Fire Prevention Bureau, a Plan Check Engineer with the Santa Rosa Building Department, a Plans Examiner with Morton/Phillips, a structural draftsman/inspector with Zucco-Fagent Associates, and an Architect with Flewelling-Logsdon & Associates.

He has also recently completed plan reviews for the Riverside County Sheriff's Department Aviation Facility in Riverside; the Arcata/Eureka Airport Expansion; Sonoma Academy, a private 99,000 sq. ft. high school in Santa Rosa; dozens of wineries in the Napa and Sonoma Valleys; many fire plan reviews of commercial and residential projects in Santa Rosa including a 91,000 sq. ft. Kaiser Medical Office Building; and automatic sprinkler system and fire alarm reviews.

Mr. Price received his Bachelor's Degree in Architecture from the University of Michigan – Ann Arbor and his Bachelor's Degree in Management from Sonoma State University. He is a licensed architect in Arizona, California, Colorado, Hawaii, Illinois, Pennsylvania, and Wyoming. Mr. Price is an ICC Certified Building Plans Examiner, ICC Certified Building Inspector, ICC Certified Special Inspector, Certified Forensic Consultant, and a Certified Green Building Professional. He also has numerous Fire Plan Review certifications and Emergency Response Training.

## Prior Project Experience

"Marriott's Canyon Villas at Desert Ridge" in Phoenix, Arizona was completed in 2004 by Mr. Dan Reeve as project manager (Senior Vice President, LJP Construction Services). This development consisted of 87 high-end timeshare units in multiple phases, including resort amenities such as pools, cascading waterfalls and clubhouse facilities. Interior elements included level 5 drywall finishes, granite countertops, pear wood cabinets, high-end lighting fixtures and textured carpeting.



Architect: Sandy Babcock (San Francisco)  
Owner: Marriott Vacation Club International  
On-sites: \$21,200,000 (2004 dollars)  
Off-sites: \$2,800,000 (2004 dollars)

"Sapphire Point" at Diamond Ridge, Castle Rock, CO, consisting of 301 single family homes in multiple phases, including 7 model homes, ranging from 3,500 to 4,500 square feet, completed by Frank Bartholomew as Senior Site Superintendent (Construction Consultant, La Jolla Pacific). Project involved development, entitlements, mass grading to blue tops, construction of off-sites (water, sewer, streets, dry utilities w/off-tract SCE backbone), house construction, sales and marketing, bond exoneration and warranty service.

Architect: JVL & Associates  
Owner: Continental Homes, D.R. Horton  
On-sites: \$91,000,000 (2004)  
Off-site: \$18,000,000 (2001)

"Riverdale Park", Thornton, CO, consisting of 220 single family homes in multiple phases, including 5 model homes, ranging from 1,250 to 2,500 square feet, completed by Frank Bartholomew as Senior Site Superintendent (Construction Consultant, La Jolla Pacific). Project involved development, entitlements, mass grading to blue tops, construction of off-sites (water, sewer, streets, dry utilities w/off-tract SCE backbone), house construction, sales and marketing, bond exoneration and warranty service.



Architect: JVL & Associates  
Owner: Continental Homes, D.R. Horton  
On-sites: \$32,000,000 (2002)  
Off-site: \$8,800,000 (1995)

"Challenger Park", Parker, CO, consisting of 350 single family homes in multiple phases, including 7 model homes, ranging from 2,500 to 4,500 square feet, completed by Frank Bartholomew as Senior Site Superintendent (Construction Consultant, La Jolla Pacific). Project involved development, entitlements, mass grading to blue tops, construction of off-sites (water, sewer, streets, dry utilities w/off-tract SCE backbone), house construction, sales and marketing, bond exoneration and warranty service.

Architect: JVL & Associates  
Owner: Continental Homes, D.R. Horton  
On-sites: \$78,750,000 (2001)  
Off-site: \$19,250,000 (1998)

Newport Crest HOA is a 460 unit condominium community consisting of 91 buildings, which required extensive reconstruction in several buildings and grounds due to water intrusion, dry-rot, termite infestation and structural settlement. The principal repairs included framing, siding, concrete, sheet metal, paint, irrigation/drainage improvements, etc. and focused on wall sections, balconies, decks, flatwork and common recreational elements.



Project:	Newport Crest, Newport Beach, CA
Owner:	Newport Crest Homeowners Association
LJP Architect:	Mr. Ron Travers, AIA
LJP Project Mgr:	Mr. Mark Buberl
Contract:	\$2,500,000
Date:	Completed in 2004

## **Projects in the Education and Public Sector – Fee Related Work**

Selected employees of LJP Construction Services have direct building experience in providing services to the Educational and Public Sectors.

## **LJP Construction Services Location:**

LJP Construction Services Headquarters  
9571 Irvine Center Drive  
Irvine, CA 92648

Located approximately 15 miles from Costa Mesa

## **Costs / Fee Schedule:**

### **HOURLY CONSULTING RATES FOR PROFESSIONAL STAFF:**

Principals	\$175.00
Vice Presidents	\$155.00
Senior Construction Consultants	\$145.00
Construction Consultants	\$135.00
Documentation Assistants	\$ 95.00
Staff Support	\$ 75.00

**NONCOLLUSION AFFIDAVIT**

(Public Contract Code Section 7106)

State of California

County of Orange ss.

\_\_\_\_\_ being first duly sworn, deposes and says that he or ~~she~~ is Donald NEFF of LJP Construction Services the party making the foregoing bid, that the bid is not made in the interest of, or on behalf of, any undisclosed person, partnership, company, association, organization, or corporation; that the bid is genuine and not collusive or sham; that the bidder has not directly or indirectly induced or solicited any other bidder to put in a false or sham bid, and has not directly or indirectly colluded, conspired, connived, or agreed with any bidder or anyone else to put in a sham bid, or that anyone shall refrain from bidding; that the bidder has not in any manner, directly or indirectly, sought by agreement, communication, or conference with anyone to fix the bid price of the bidder or any other bidder, or to fix any overhead, profit or cost element of the bid price, or of that of any other bidder, or to secure any advantage against the public body awarding the contract of anyone interested in the proposed contract; that all statements contained in the bid are true; and, further, that the bidder has not, directly or indirectly, submitted his or her bid price or any breakdown thereof, or the contents thereof, or divulged information or data relative thereto, or paid, and will not pay, any fee to any corporation, partnership, company, association, organization, bid depository, or to any member or agent thereof to effectuate a collusive or sham bid.

\_\_\_\_\_  
Signature of Bidder

DON NEFF  
Print Name

## NOTARY FOR NONCOLLUSION AFFIDAVIT

Subscribed and sworn to (or affirmed) before me this 12<sup>th</sup> day of January 2011-2012

\_\_\_\_\_  
Signature of Notary  
[SEAL OF NOTARY]

VIJAY D. RAHEJA

Typed Name of Notary

## ACKNOWLEDGMENT

State of California  
County of Orange )

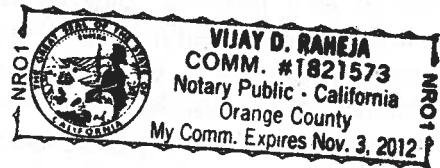
On 1/12/12 before me, Vijay D. Raheja ( Notary Public )  
(insert name and title of the officer)

personally appeared Donald Richard Rogers Neff  
who proved to me on the basis of satisfactory evidence to be the person(s) whose name(s) is/are  
subscribed to the within instrument and acknowledged to me that he/she/they executed the same in  
his/her/their authorized capacity(ies), and that by his/her/their signature(s) on the instrument the  
person(s), or the entity upon behalf of which the person(s) acted, executed the instrument.

I certify under PENALTY OF PERJURY under the laws of the State of California that the foregoing  
paragraph is true and correct.

WITNESS my hand and official seal.

Signature Vijay D Raheja (Seal)



**DRUG-FREE WORKPLACE CERTIFICATION**

This Drug-Free Workplace Certification is required pursuant to Government Code Sections 8350, et seq., the Drug-Free Workplace Act of 1990. The Drug-Free Workplace Act of 1990 requires that every person or organization awarded a contract for the procurement of any property or services from any State agency must certify that it will provide a drug-free workplace by doing certain specified acts. In addition, the Act provides that each contract awarded by a State agency may be subject to suspension of payments or termination of the contract and the contractor may be subject to debarment from future contracting, if the state agency determines that specified acts have occurred.

Pursuant to Government Code Section 8355, every person or organization awarded a contract from a State agency shall certify that it will provide a drug-free workplace by doing all of the following:

- a) Publishing a statement notifying employees that the unlawful manufacture, distribution, dispensation, possession or use of a controlled substance is prohibited in the person's or organization's workplace and specifying actions which will be taken against employees for violations of the prohibition;
- b) Establishing a drug free awareness program to inform employees about all of the following:
  - 1) The dangers of drug abuse in the workplace;
  - 2) The person's or organization's policy of maintaining a drug-free workplace;
  - 3) The availability of drug counseling, rehabilitation and employee-assistance programs;
  - 4) The penalties that may be imposed upon employees for drug abuse violations;
- c) Requiring that each employee engaged in the performance of the contract be given a copy of the statement required by subdivision (a) and that, as a condition of employment on the contract, the employee agrees to abide by the terms of the statement.

I, the undersigned, agree to fulfill the terms and requirements of Government Code Section 8355 listed above and will publish a statement notifying employees concerning

(a) the prohibition of controlled substance at the workplace, (b) establishing a drug-free awareness program, and (c) requiring that each employee engaged in the performance of the contract be given a copy of the statement required by Section 8355(a) and requiring that the employee agree to abide by the terms of that statement.

I also understand that if the DISTRICT determines that I have either (a) made a false certification herein, or (b) violated this certification by failing to carry out the requirements of Section 8355, that the contract awarded herein is subject to suspension of payments, termination, or both. I further understand that, should I violate the terms of the Drug-Free Workplace Act of 1990, I may be subject to debarment in accordance with the requirements of Section 8350, et seq.

I acknowledge that I am aware of the provisions of Government Code Section 8350, et seq. and hereby certify that I will adhere to the requirements of the Drug-Free Workplace Act of 1990.

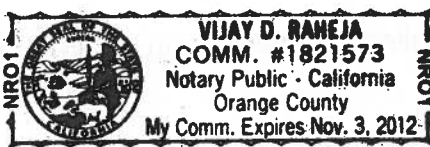
*La Jolla Pacific*  
*dba LJP Construction Services*  
\_\_\_\_\_  
NAME OF CONTRACTOR

*Don Neff, President*  
\_\_\_\_\_  
Signature

*DON NEFF*  
\_\_\_\_\_  
Print Name

*President/CEO*  
\_\_\_\_\_  
Title

*1/12/12*  
\_\_\_\_\_  
Date



A Proposal to

## **Coast Community College District**

Advisory Services for Asset Management of District Owned  
Land

Due: January 13, 2012 at 3:00 p.m. PST

**Original**

**RFP Number: 2004**

**Proposal Prepared for:**

John Eriksen

Purchasing Department

Purchasing and Business Services

1370 Adams Avenue

Costa Mesa, CA 92626

**Prepared by:**

**Contact:**

Renata Simril, Managing Director

Jones Lang LaSalle Americas, Inc.

4 Park Plaza Suite #550

Irvine, CA 92614-8560

Phone: 213.239.6171

Fax: 213.239.6100

Email: [renata.simril@am.jll.com](mailto:renata.simril@am.jll.com)



Public Institutions Practice Group  
515 S. Flower St., Suite 1300, Los Angeles, CA 90071  
tel +1 213 239 6171 fax +1 213 239 6100

January 13, 2012

John Eriksen  
Purchasing Department  
Purchasing and Business Services  
1370 Adams Avenue  
Costa Mesa, CA 92626

**Re: Coast Community College District RFP #2004**

Dear Mr. Eriksen:

Thank you for the opportunity to respond to this very important engagement. It is with great pleasure that Jones Lang LaSalle Americas, Inc. (JLL) and Keyser Marston Associates, Inc. (KMA) present our proposal for Asset Management Advisory Services to Coast Community College District (CCCD). As you will note in our submission, our team brings CCCD core capabilities in all facets of real estate asset strategies and management for higher education. Collectively, our Public Institution practice team and KMA have worked on hundreds of consulting and transaction assignments with universities and similar public sector clients for over 50 years, and will bring CCCD a depth and breadth of experience that distinguishes us from other real estate services firms.

Based upon this experience, we understand the pressures that college and universities like CCCD are facing. Increased competition to attract and retain out-of-state students, high quality faculty and staff; the impacts of the State budget; and operational budget concerns among other issues all affect your real estate decisions. In addition, CCCD's goal of maintaining its prominence as one of the nation's largest -- and finest -- community colleges and its #1 ranking out of Orange County's nine community colleges in the number of students it transfers to the University of California and California State University systems, creates the need for a trusted advisor to help provide real estate consulting and transaction solutions to support the college's growing and changing population needs.

The JLL/KMA team would be honored to be your trusted advisor and we are prepared to commit the time, energy and resources necessary to ensure that CCCD has expert decision-making advice. Our team is comprised of local, regional and national public institutions real estate professionals supported by a local staff that brings deep knowledge of the greater Orange County market.

We are confident that our team's experience and previous work is specifically relevant to the scope of work contemplated in the RFP. We can help CCCD develop implementable solutions that will meet your goals. Again, we appreciate the opportunity to respond to this solicitation and look forward with great enthusiasm to working in partnership with you. If you have any questions, please contact me via 213.239.6171 or [renata.simril@am.jll.com](mailto:renata.simril@am.jll.com), or James Rabe via 213-622-8095 or [jrabe@keysermarston.com](mailto:jrabe@keysermarston.com).

Sincerely,

A handwritten signature in black ink, appearing to read "Renata Simril".

Renata Simril  
Managing Director  
Public Institutions Practice Group  
Jones Lang LaSalle Americas, Inc.

A handwritten signature in black ink, appearing to read "James Rabe".

James Rabe, CRE  
Senior Principal  
Keyser Marston Associates, Inc.



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## **Section A: Experience and Qualifications**

Jones Lang LaSalle (JLL) and Keyser Marston Associates (KMA) have teamed on this proposal. Our firms are industry leaders in providing real estate advisory and transaction services that provides comprehensive, services and solutions for real estate owners, occupiers and investors on local, regional and global levels. We have been assisting our public clients collectively for over 50 years with their strategic real estate and project development needs.

Jones Lang LaSalle provides our public and private clients a full range of integrated real estate solutions directly related to the Scope of Services outlined in this RFP including asset and portfolio management best practices, asset monetization strategies, master planning and land use analysis, developer solicitation and project implementation, public-private negotiations, deal structuring, financial feasibility and alternative financing strategies. These local connections and insights combined with our national and global resources help us develop tailored solutions that align with client needs. In Orange County our team of 27 has been providing services throughout the County for over 13 years.

KMA is a full service real estate, financial, redevelopment and economic consulting firm specializing in real estate advisory and evaluation services, redevelopment services, and financial analyses. Most KMA advisory services involve long-standing, ongoing client relationships with city and county governments, including California's largest redevelopment agencies. KMA's services fall within the following general areas:

- Real Estate
- Redevelopment
- Economic Development
- Affordable Housing
- Fiscal Impact
- Valuation & Litigation Support
- Infrastructure Finance

We are confident that together our team can successfully achieve the goals and objectives outlined in the RFP and provide the highest level of client service.

### **Our Team's Public Sector and Higher Education Focus**

JLL's specialized Public Institutions practice is comprised of 120 local and nationally dedicated real estate professionals with a solid track record of helping public and quasi-public sector clients cover a variety of complex real estate needs directly applicable to the scope of work outlined in the RFP and a demonstrated capacity to perform the required services. The practice group has helped more than 250 federal, state, educational and local government clients find new ways to maximize the use of facilities and implement their real estate goals while lowering operating costs and improving cash flow.

Our experience serving these clients has given us deep knowledge of the unique language, decision-making process, and political and financial framework that organizations such as Coast Community College District (CCCD) must operate within while implementing their facilities and real estate strategies. As evidenced by our work with educational and public institutions like Cal State San Marcos, Howard University, Orange County and Napa County (and further illustrated in Exhibit I on the following page), we look forward to demonstrating to CCCD how we combine our public and private sector best practices and experience to deliver a full range of integrated real estate, facility, development and financial advisory services to help CCCD implement their project priorities.

Our team understands the pressures community colleges like CCCD are facing including increased competition to attract and retain full-time and international students, faculty and staff; reduction of federal and state aid, operational budget issues and changes; as well as governance, demographic and sustainability shifts all present unique business implications that affect real estate decisions. CCCD's goal of maintaining its prominence as one of the nation's largest -- and finest -- community colleges and its #1 ranking out of Orange County's nine community colleges in the number of students it transfers to the University of California and California State University systems creates the need for a trusted advisor to help provide real estate consulting and transaction solutions to support CCCD's growing population needs. Our collective success with higher education projects demonstrates our ability to perform the scope of services in Section V of the RFP.

*We have completed over 1,000 projects for a variety of college and University clients.* Through our experience working with University administrators, facilities directors, deans, chancellors, trustees and other key constituents, we have developed consensus-building communication strategies and tools to work through competing needs that can stand in the way of getting priority projects started and finished in a timely manner. Our team has diverse experience across all University asset

types (academic buildings, laboratories, administration, athletic, retail and ancillary support facilities) and has broad experience with national institutions that we can leverage to help to meet CCCD's real estate needs.

Augmenting our higher education and public sector experience, KMA brings to our team a complete range of real estate services including market analyses, highest and best use studies, financial feasibility analyses, preparation of requests for qualifications and proposals, developer selection, and disposition negotiations including ground lease negotiations. KMA's disposition services cover a broad spectrum including: preparation of developer solicitation documents, developer selections and reviews including due diligence, participation in developer or owner negotiations, and analysis of pending agreements. KMA has taken an active role in the negotiation process leading to literally hundreds of disposition agreements. A particular expertise is the negotiation of ground leases between public and private sectors. Examples include the Solair and Hollywood Highland ground leases with the MTA, Del Rey Shores and other leases in Marina del Rey for Los Angeles County, Waterfront Hyatt in Huntington Beach, Balboa Bay Club in Newport Beach various commercial leases at the Torrance airport, the Sheraton Hotel at the Pasadena conference center and numerous assignments for the Cities of Anaheim, Costa Mesa, Long Beach and Santa Ana.

### Examples of Previous Engagements

The Jones Lang LaSalle/Keyser Marston team is committed to helping CCCD achieve its project goals and our team's core competency is helping colleges like CCCD to develop and execute strategies for real estate development, financing, and operations and maintenance supported by a sound business case and market driven execution strategies. We look forward to working in partnership with CCCD to develop real estate solutions that support your individual project goals, are defensible and help to build consensus among various college stakeholders.

#### EXHIBIT I: Representative Higher Education Experience

Services	Detail	Results	Clients
Strategic Consulting	<ul style="list-style-type: none"> <li>• Highest &amp; Best Use Analysis</li> <li>• Cost/ Benefit Analysis</li> <li>• Lease vs. Buy Analysis</li> <li>• Alternative Location Analysis</li> <li>• Sale vs. Ground Lease Analysis</li> </ul>	<ul style="list-style-type: none"> <li>• Identifies potential sources of additional revenue</li> </ul>	<ul style="list-style-type: none"> <li>• George Washington University</li> <li>• New Jersey/City University</li> </ul>
Sales, Acquisitions, Leasing	<ul style="list-style-type: none"> <li>• Disposition of Real Property</li> <li>• Acquisition of Real Property</li> <li>• Negotiation and renewals of leases for buildings and/or land</li> </ul>	<ul style="list-style-type: none"> <li>• Superior implementation meets or exceeds plan/goals to achieve value for institution</li> </ul>	<ul style="list-style-type: none"> <li>• University of California, Berkeley</li> <li>• University of California, San Diego</li> <li>• University of Southern California</li> </ul>
Financing Solutions	<ul style="list-style-type: none"> <li>• Tax exempt and taxable financings</li> <li>• Transaction Structuring</li> <li>• Capital Sourcing</li> <li>• Derivative Products</li> </ul>	<ul style="list-style-type: none"> <li>• Complete transactions on a disciplined basis</li> <li>• Exhibit value of client's credit structure</li> </ul>	<ul style="list-style-type: none"> <li>• Xavier University</li> <li>• School of Visual Arts</li> </ul>
Project & Development Management	<ul style="list-style-type: none"> <li>• Design &amp; Construction management</li> <li>• Budget &amp; Cost Estimation</li> <li>• Real Estate Portfolio Management</li> <li>• Developer RFP, Selection, &amp; Negotiations</li> </ul>	<ul style="list-style-type: none"> <li>• Delivers on time and on budget</li> <li>• Provides informed, strategic approach to portfolio decisions</li> <li>• Facilitates P3 formation</li> </ul>	<ul style="list-style-type: none"> <li>• Cal State San Marcos</li> <li>• University of Georgia</li> <li>• Georgia Tech</li> <li>• University of Pennsylvania</li> </ul>
Asset Monetization & Property Management	<ul style="list-style-type: none"> <li>• Development Management</li> <li>• Facilities Management</li> <li>• Restructuring/ monetization of real property assets</li> </ul>	<ul style="list-style-type: none"> <li>• Assists institution in evaluating their real estate assets to maximize value</li> </ul>	<ul style="list-style-type: none"> <li>• San Diego Unified School District</li> <li>• Arizona State University</li> <li>• Tidewater Community College</li> <li>• Johns Hopkins University</li> <li>• George Mason University</li> <li>• Camden County College</li> </ul>

In addition to the above summary which highlights our service offerings, on the following page we have provided a few select recent project examples which are similar to the nature of the service being requested in this engagement.

## **Coast Community College District**

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### **County of Orange: Master Plan & Project Feasibility**

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Jones Lang LaSalle was retained by the County of Orange to provide feasibility and market assessment analysis for the development of a Master Plan for County controlled parcels that were formerly a part of the El Toro Marine Base in Irvine California which consist of a 100 Acre Parcel, as well as the Western Alton Parcels (44 acres) and Eastern Alton Parcels (57 acres), totaling approximately 200 acres.

- The JLL team prepared a feasibility study and recommended land use development options in order to maximize revenue on this publicly owned property;
- Conducted an initial market assessment of the range of short and long term uses and potential viability for development of the County's real property assets located at El Toro;
- The results of this analysis are intended to guide the County in the prioritization of potential uses for the subject sites, and to eliminate uses that will not be deemed feasible given market demand, competitive supply, site characteristics, and other factors.
- JLL is now assisting the County staff with the solicitation of a Master Development partner.

### **Cal State San Marcos: Asset Land/Repositioning and Developer Solicitation**

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CSUSM sought support to analyze the feasibility of a variety of development and financing structures, including public-private partnerships, to optimize the design expertise and capital investment needed to achieve their Athletic Development Vision.

- The JLL team performed due diligence activities, including analyzing site conditions, surrounding uses, market economics of various types of development and legislation governing privately owned development on campus lands;
- Analyzed unsolicited proposals, interviewed potential development partners and regional arena operators to understand the development community's interest in the project and inform the costs and operating economics for an arena of the contemplated scale. Additionally, best practices were studied for Event Center design and operations;
- Evaluated alternative sources of revenue for the project, including public-private partnership opportunities, student housing, hospitality and retail;
- JLL is currently managing a solicitation process to select a development partner for CSUSM.

### **Howard University: Facilities and Capital Projects Management**

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To more effectively compete for students and faculty, Howard needed to improve the quality and appearance of its 6 million square foot campus portfolio. The University's goals were to enhance in-house staff to quickly address priority facilities services and capital planning; and achieve a high-performance facilities and capital projects management team that would allow for total campus renewal. The JLL team's approach included the following:

- Analyzed the University's Master Plan and conducted a diagnostic assessment of facilities and capital projects management;
- Re-engineered campus-wide service order system, CMMS, and work flow processes;
- Conducted building and MEP condition assessments;
- Developed an integrated strategy for outsourcing facilities management and capital projects management programs.

### **County of Marin: Master Plan & Developer Advisory Services**

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Marin County required a new Emergency Operations Facility, Sheriff's Office and Fire station to be located on their Civic Center campus, which also would house the historic Frank Lloyd Wright Marin Civic Center.

JLL was retained by Marin County to provide three major phases of support on this important project:

- Strategic Planning: Analyzed various alternatives to design, build and finance this facility and provide recommendation as to a preferred approach
- Project Delivery Plan: Based on the development structure approved by the Board of Supervisors, formulated a detailed project delivery plan to act as a road map to implementation which includes a national design competition and a solicitation for a 3rd party development partner.
- Master Consultant: Including the following services:

1. Selection and project management of sub-consultants required to support the process including a Program Architect, Cost Estimator and Technology Consultant;

## **Coast Community College District**

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2. Assist the county in the formulation and execution of a two stage solicitation to secure a design and development team to build the facility to a guaranteed maximum price (GMP) utilizing a process that will include a jury driven design competition;
3. Aide the county in negotiating a development agreement with the selected development team and continued to provide project management support to the county throughout design and construction.

### **County of Los Angeles: *Marina del Rey Asset Management and Ground Lease Negotiations***

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KMA provides ongoing assistance to the County on asset management issues and ground lease negotiations for the County's property ownership in Marina del Rey. The land and water-oriented projects were developed using ground leases of County owned land in the 1960s. KMA assists the County with (1) local coastal plan updates and related asset strategies, (2) the developer selection process for new development on vacant parcels or underutilized parking lots and (3) lease renegotiations and lease extensions for the redevelopment or rehabilitation of existing development parcels. KMA activities include:

1. Evaluation of alternative development potential for various parcels in the Marina;
2. Estimation of ground lease revenues and public revenues from alternative development scenarios for landside and water development;
3. Assistance in preparation of Requests for Proposals, evaluation of proposals and selection of developers;
4. Evaluation of lessee requests for lease extensions to ensure that the County is receiving fair market value;
5. Assistance in lease negotiations;
6. Briefing County management and Board of Supervisors.

### **City of Anaheim: *Redevelopment Evaluation, Developer Selection, Market Analyses***

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KMA provides ongoing assistance to the City and its Redevelopment Agency for all types of real estate development including market rate and affordable housing, retail, entertainment, industrial, office and hotel uses. KMA also provides market analyses as to the long-term market viability and feasible mix of uses for Specific Plans. Specific tasks have included:

1. Evaluate proposals from developers regarding redevelopment projects or use of City property including review of market projections and financial feasibility;
2. Prepare market analyses for retail, residential, industrial and hotel uses;
3. Identify near-term and long-term market feasibility of real estate uses;
4. Identify funding sources for development projects;
5. Prepare requests for proposals and assist in evaluation and selection of developers;
6. Assist in Council briefings and public hearings.

## **CCCD Project Team Roles**

Our team has been assembled based on the requirements of the specific assignment, and each proposed team member possesses the proper balance of skills, expertise and public sector perspective to bring optimal results to CCCD. In addition, a majority of our team members have had prior experience working directly with colleges and universities, as well as local governments. Each of our team is prepared to dedicate the time, energy and resources required to perform at the highest level of client satisfaction.

The dedicated JLL/KMA team will be managed by **Renata Simril**, who has nearly 20 years of experience serving as a government official real estate advisor and mixed-use commercial developer. She brings her broad knowledge and expertise in both the public and private sector to lead all advisory, development, and economic analysis for CCCD. Ms. Simril is committed to serve CCCD in the following areas:

- Act as your single point of contact;
- Be completely accountable for ensuring satisfaction with service delivery;
- Manage the team and their compensation across service lines and geographies, motivating team members, ensuring consistency of services and providing appropriate rewards for success.

Supporting Ms. Simril will be **James Rabe** and **Kevin Engstrom** with KMA, who collectively bring over 50 years of experience specific to developer solicitation, financing and deal structuring. David Prolo and Roger Smith of Jones Lang

LaSalle will provide oversight and expertise in the areas of facilities management, construction and development. The chart below outlines our team members, their experience and the role they have been assigned for this project. Resumes for each is also provided on the pages that follow.

Qualifications	Master Planning	Asset Management	Asset Monetization Strategies	Public Private Partnerships	Development & Transaction Advisory	Orange County Market Knowledge	Energy and Sustainability	Facilities & Property Management
Team Member (Title) Roles (Percentage of Time)								
<b>Renata Simril</b> (Managing Director) Real Estate Strategy, Management & Oversight (100%)	✓	✓	✓	✓	✓	✓		✓
<b>Jim Rabe</b> (Senior Principal) Developer Advisory & Transaction (100%)		✓	✓	✓	✓	✓		
<b>David Prolo</b> (Senior Vice President) Construction & Development (50%)	✓			✓	✓	✓	✓	✓
<b>Roger Smith</b> (Senior Project Manager) Facilities Asset Management (50%)	✓	✓		✓			✓	✓
<b>Kevin Engstrom</b> (Senior Principal) Project Manager (100%)	✓		✓	✓	✓	✓		

## Team Resumes for Key Real Estate Professionals

### Renata Simril, Managing Director

Ms. Simril is a Managing Director in Jones Lang LaSalle's Public Institutions practice based in Los Angeles, CA with a local office in Irvine. Bringing nearly 20 years of experience to the position, Ms. Simril provides advisory services to optimize public sector leased and owned portfolios, support large-scale developments through the real estate lifecycle and implement public-private partnerships. Prior to joining Jones Lang LaSalle in the fall of 2010, Ms. Simril served as Senior Vice President with Forest City Development a national real estate developer company where she oversaw entitlement, development, leasing and disposition functions. She completed over 1 million square feet of mixed-use (residential/retail) product; \$6 million in lease transaction value; and disposition of several retail assets.

Ms. Simril also served as Deputy Mayor for Economic Development for the Mayor's Office of Economic Development (MOED) for the City of Los Angeles, CA during the Hahn Administration. Her responsibilities included the advancement of policy, legislative and budget oversight to promote economic development, private sector financial investment and community growth.

Ms. Simril earned a Master's degree in Real Estate Development from the University of Southern California's Sol Price School of Public Policy and a B.A. in Urban Studies from Loyola Marymount University in Los Angeles. She serves as the Chair for the USC Lusk Center Minority Program in Real Estate, Trustee/Regent for Loyola Marymount University and is on the ULI LA Leadership Council. Ms. Simril is also an adjunct professor in the University of Southern California's Sol Price School of Public Policy.



**Jim Rabe, Senior Principal**

Mr. Rabe is a Senior Principal in KMA's Los Angeles office. He provides public and private sector clients with services in the following areas: public finance, specific plan feasibility, fiscal impact, financial modeling, developer selection, asset management, ground leasing and deal structuring and transaction negotiation. Recognized as an expert in real estate advisory services, Mr. Rabe specializes in public/ private transactions. He has assisted public and private clients in the analysis and implementation of residential, commercial, industrial, office, hotel, and mixed- use projects, and master plan developments in California, Arizona, and Nevada.

Mr. Rabe earned his Master of Arts in Economics from the University of Southern California, and his Bachelor of Arts in Economics from the University of California, San Diego. Mr. Rabe is a lecturer at the University of Southern California's Sol Price School of Public Policy and has served as a guest lecturer at the University of California, Los Angeles School of Architecture and School of Public Affairs.

**David Prolo, Senior Vice President**

Mr. David Prolo is a Senior Vice President of Jones Lang LaSalle Project and Development Services practice where he manages construction and development projects and teams throughout Southern California. Mr. Prolo's project experience includes unique large scale venues, mixed-use, residential, commercial and public/private development projects. With over 17 years experience serving as an executive leader with western region real estate developers, Mr. Prolo understands the complex development requirements and unique nuances of the region. Prior to joining Jones Lang LaSalle, Mr. Prolo was the Regional President of John Laing Homes responsible for over \$1.550 billion in revenue generated through the development of over 4000 units. Mr. Prolo has managed the development of fourteen mixed-use communities, five master planned communities and over 500,000 square feet of various tenant improvement and renovations inclusive of OSHPD facilities. He has worked with municipal entities as an advisor providing "best and highest use" studies on retail, educational and housing development.

Mr. Prolo has a Bachelor of Science in Construction Management from Brigham Young University and is a member of Sigma Lambda Chi. He serves Treasurer and Executive Committee Board Member for Home Aid Orange County and Assistant Scout Master for the Boy Scouts of America—Orange County Council.

**Roger Smith, Senior Project Manager**

Mr. Smith is Public Institutions' national subject matter expert on facility management and commercial property management. He currently serves as a senior project manager for Public Institutions' Air Force Housing Privatization program and is managing the Howard University facilities and capital project. Mr. Smith has extensive experience working at all client levels to develop and implement creative solutions for achieving facilities and real estate operational improvements. He was a core member of the JLL team that designed and implemented the U.S. Army's Residential Communities Initiative Program and was extensively involved in 20 Army housing privatizations. Mr. Smith has 10 years of experience advising on public-private initiatives, including: project management, financial analysis, development planning, operations planning, legal/governance strategies, partnering strategies, incentive plans, transition plans and solicitation/proposal evaluation strategies.

Mr. Smith graduated Cum Laude from Ohio State University, Columbus, OH with a B.S. in Business Administration (Corporate Finance) and minors in Mechanical Engineering/Sciences.

**Kevin Engstrom, Senior Principal**

Mr. Engstrom is a Senior Principal in KMA's Fullerton office. For over 20 years, Mr. Engstrom has provided public and private clients with real estate and financial expertise, including: market and financial feasibility studies, fiscal impact analyses, economic revitalization consulting, financial modeling, developer selection and disposition consulting. He has conducted a number of market and feasibility studies for cities throughout California. For these analyses, Mr. Engstrom assessed current market conditions; projected future demand for residential, retail, office, industrial and hotel development; tested the financial feasibility of prototypical projects; and prepared implementation strategies. He also provided market and

## Coast Community College District

financial services for over 50 hotel projects throughout California, including the Beverly Hills Montage, Huntington Beach Grand Hyatt, Anaheim Doubletree, Pasadena Sheraton and the Glendale Embassy Suites.

Mr. Engstrom is a member of the Urban Land Institute, the California Redevelopment Association (CRA) and the International Council of Shopping Centers. For the past four years he co-instructed the Basic Pro Forma Class at the CRA's Redevelopment Institute in Southern California. Mr. Engstrom has also served as an instructor at California State University Fullerton in the Geography department. Mr. Engstrom earned his master of arts from the University of Arizona and his bachelor of arts from Villanova University.

### Section B: Location of Consultant Offices

Jones Lang LaSalle and KMA are committed to serving the needs of both public and private sector clients in Southern California, and have been established in the Los Angeles and Orange County markets as a trusted real estate advisor collectively for nearly 50 years. Below are the locations of our *five (5) corporate offices within a 30 mile radius of Costa Mesa*:

- **Orange County**– 4 Park Plaza Suite 550 Irvine, CA 92614-8560. Tel: 949.724.3400 37 employees
- **El Segundo** - 2361 Rosecrans Avenue, Suite 150, El Segundo, CA 90245 Tel: 424.294.3400 26 employees
- **Downtown Los Angeles** - 515 South Flower Street, Suite 1300, Los Angeles, CA 90071 Tel: 213.239.6000 # employees
- **West Los Angeles** - 2049 Century Park East, Suite 2750, Los Angeles, CA 90067. Tel: 310.595.3660 # employees

Below are the locations of Keyser Marston's two (2) *corporate offices located within a 30 mile radius of Costa Mesa, CA*.

- **Los Angeles**– 500 South Grand Avenue, Suite 1480, Los Angeles, CA 90071. Tel: 213.622.0895 8 employees
- **Fullerton** - 110 East Wilshire Street, Suite 400, Fullerton, CA 92832. Tel: 714.526.0444 2 employees\\

### Section C: Proposed Cost of Services

Our team's approach to compensation will be consistent with our other relationships wherein we assume a fiduciary responsibility in assisting our clients with attaining their objectives. Over the years, we have been compensated for our work in a number of ways including working on a firm fixed price and success/transaction fees. Our goal is to deliver highly professional services at competitive rates. It is important to note that the staff assigned to this project are compensated by salary and bonus (rather than individual transaction commissions) and a key determination of individual compensation is client satisfaction. This structure eliminates the focus of individuals on the size of the transaction commissions and aligns our interests to ensuring client satisfaction. Our staff will succeed in the long run by satisfying clients' objectives and earning their confidence, respect, and trust.

This proposal reflects the cost of services for the Jones Lang LaSalle team to accomplish the tasks outlined in the Scope of Project and in accordance with the terms and conditions detailed in the Request for Proposals (RFP). The hourly fees offered in this fee proposal will remain valid through the term of the contract and the contract extensions. These labor hour rates are fully-loaded rates, inclusive of overhead, G&A and profit.

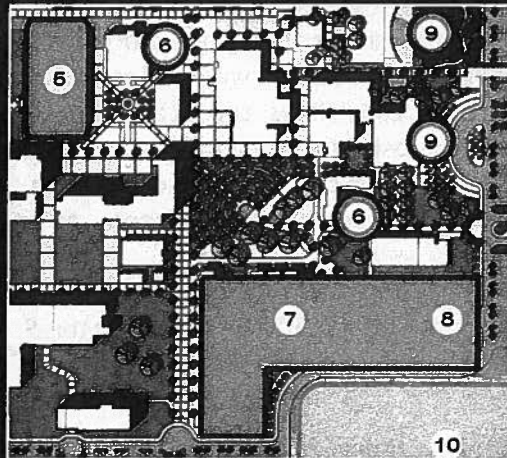
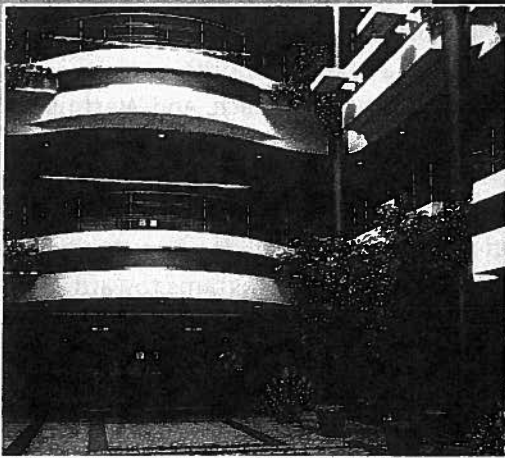
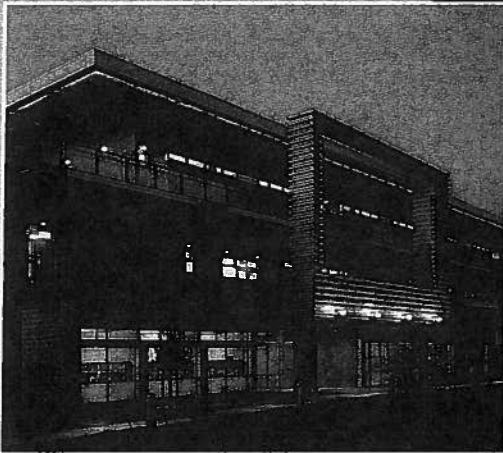
<b>Real Estate Service Category</b>	<b>Classification(s)</b>	<b>Rate</b>			
		<b>Hourly Rate* (Averaged)</b>	<b>2011</b>	<b>2012</b>	<b>2013</b>
<b>Real Estate Financial Advisory Services</b>					
Program Manager	<i>Real Estate Strategy &amp; Management &amp; Oversight</i>	\$299.35	\$290.63	\$299.35	\$308.33
Senior Real Estate Specialist	<i>Development/ Advisor</i>	\$294.14	\$285.57	\$294.14	\$302.96
Real Estate Specialist	<i>Facilities Asset Management; Construction &amp; Development</i>				
Project Manager	<i>Project Management &amp; Analysis</i>	\$210.70	\$204.56	\$210.70	\$217.02
Financial Analyst	<i>Pro Forma and Fiscal Analysis</i>	\$162.69	\$157.95	\$162.69	\$167.54



Proposal | Original

# Advisory Services Asset Management of District-Owned Land

RFP#2004



Coast Colleges



Inspiration. Innovation. Graduation.

Attachment 4

**RBF**  
CONSULTING  
A Baker Company



January 13, 2012

JN: 10-108488.999

Mr. John M. Eriksen  
Director of Purchasing  
Coast Community College District  
1370 Adams Avenue  
Costa Mesa, CA 92626

**Subject: Advisory Services for Asset Management of District-Owned Land (RFP# 2004)**

Dear Mr. Eriksen:

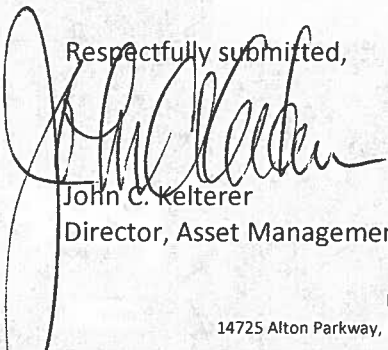
On behalf of RBF Consulting, Inc. (RBF), we are pleased to present our qualifications for assisting the Coast Community College District in implementing its *Vision 2020 Facilities Master Plan*. The Plan provides the District with a wonderful analysis of where it stands currently and where it needs to go in the future. After reviewing the Plan in detail and strategizing about accomplishing the ambitious entrepreneurial programs, we have assembled a highly experienced team of professionals with a broad range of skills and professional backgrounds.

Each person brings unique and complementary technical skills to the team and the District. Our goal is to provide the District with a creative, comprehensive, cost-effective, full-service approach to financing, managing, and implementing land use development. We are accustomed to working on complex long-range projects and pride ourselves on our reputation for effective collaborative working relationships with financing entities, City staff, State agencies, college stakeholders, and the general public. We understand the realities of land use development and have long-standing and positive working relationships with staff in the cities of Costa Mesa, Garden Grove, Newport Beach, and Westminster, where the District-owned properties are located.

Implementation of a vision is an ongoing process. To accomplish the goals identified in the *Vision 2020 Facilities Master Plan*, the District will need to build a multi-year partnership with a firm that has the creativity, resources, capabilities, and local management team to move the programs toward completion without losing focus, momentum, and flexibility. The RBF Team is ready and able to take on that challenge and remain committed to completion. Above all, we will work for the District as the District's representative and, more importantly, as its advocate.

Thank you for the opportunity to participate in the selection process. As we say in our company, "we are each others' greatest resource." We hope that this Statement of Qualifications shows you how we can be the District's greatest resource. If you have any questions or need additional information, please contact John Kelterer at (949) 855-5782 or [jkelterer@rbf.com](mailto:jkelterer@rbf.com).

Respectfully submitted,

  
John C. Kelterer  
Director, Asset Management Group



Michael Burke  
Executive Vice President

**Size:** 540 employees  
**Established:** 1944  
**Incorporated:** State of California, November 1961

**Locations:**

Camarillo, CA  
Carlsbad, CA  
Irvine, CA  
Las Vegas, NV  
Los Angeles, CA  
Monterey Bay, CA  
Oakland, CA  
Ontario, CA  
Palm Desert, CA  
Phoenix, AZ  
Sacramento, CA  
San Diego, CA  
San Jose, CA  
Temecula, CA  
Tucson, AZ  
Walnut Creek, CA

**Services Provided:**

**Planning:**

Asset Management  
Land Planning  
Transportation Planning  
Environmental Services  
Watershed Management  
Urban Planning and Design  
GIS  
Visual Analysis and Design

**Design:**

Civil Engineering  
Transportation Engineering  
Water Resource Engineering  
Structural Engineering  
Traffic Engineering  
Electrical Engineering  
Landscape Architecture  
Stormwater Management

**Construction:**

Field Surveying  
Mapping / Right of Way  
Construction Staking  
Construction Management  
Construction Inspection

## Experience

RBF Consulting, a Company of Michael Baker Corporation (RBF), is one of the Nation's leading planning, environmental, design, and construction firms. Professionals within the firm provide expertise, experience, and solutions to achieve the goals, objectives, and visions of clients, including public and government agencies, the development community, private enterprise, non-profit organizations, and colleague firms.

From RBF's beginning in 1944 in southern California, the company has grown to a full service consulting firm with project experience in 13 countries, 27 states and with over 700 local agencies. RBF has a team of 540 professionals with 16 offices in Western United States. The recent merger with Baker Corporation provides RBF with the increased strength of over 100 offices and 3,200 employees. The combined resources serve local, national, and international markets, with capability to provide a comprehensive range of services on a national scale for all sizes and categories of projects. Our team is ranked in the top 10 percent of U.S. engineering practices by Engineering News-Record (ENR).

## Key Qualification Factors

**Full Range of Asset Management Services** | RBF's Asset Management Group provides planning, entitlement, design, construction and managerial services to landowners, developers, real estate investment entities and financial institutions for all sizes and categories of development projects. Our due diligence/asset evaluation, financing, planning, design and construction experts assist clients by offering professional determinations regarding realistic development opportunities.

RBF provides clients with an examination of potential technical, governmental and environmental constraints for each project as well as the ability to provide value-engineering solutions for individual projects. RBF has a full range of consulting services available to clients throughout the development process, from initial land acquisition to construction and post-construction coordination. These services allow clients to use RBF as an extension of their own staff, bringing in the necessary expertise on each project as needed.

**Experience with Colleges and Universities** | The RBF Team has completed more than 300 projects for over 50 California colleges and universities in the past 10 years. ***This includes working with over 20 California Community Colleges.*** Our clients include all types of higher education facilities, from community colleges and technology training institutions through private and public universities, both for new construction and for renovation / modernization. RBF's extensive experience in the planning and engineering of educational facilities include master planning, transportation planning, environmental planning, parking design, landscape design, signage and wayfinding programs, stormwater management programs, and construction management. Most of our projects have required close collaboration with city staff, elected officials, city attorneys, and community members in order to obtain project approvals or to revise planning policy documents, such as General Plan amendments, Specific Plans, and zoning code updates. This includes RBF's current involvement with the Coast Community College District's (District's) Maritime Training Center Initial Study/Mitigated Negative Declaration located in Newport Beach.



Proposal for

**Advisory Services for Asset Management  
of District-Owned Land**

RFP # 2004

Page 1

**Coast Colleges**  
Inspiration. Innovation. Graduation.



**Understanding of Coast Community College Objectives** | The RBF Team understands that the District seeks assistance in developing and managing programs, partnerships, leases, and entitlements for its real estate assets in order to generate revenue that will augment annual budgets or meet debt service for capital construction projects. In particular, the District seeks to implement an asset development program for District-owned off-campus property that is underutilized or that is not needed to provide space for purely academic activities. In addition, the District wants to enter into public/private joint venture partnerships to develop mixed-use projects (Golden West and Orange Coast at corner of Fairview and Merrimac Way). Other entrepreneurial projects of interest include a multi-college success center (Coastline), recycling enterprise to be developed by the Associated Student Body in collaboration with the City of Costa Mesa (as a component of the Career Technical Education Program) (Orange Coast), and a sports complex (Golden West). Of critical importance is the need to provide student housing to accommodate the anticipated increased enrollment of non-resident international students through the International Student Dual Admission Program (SIDA) (Golden West and Orange Coast). The successful implementation of some projects will require a general plan amendment and/or a zone change.

Funding for these projects will be primarily from external sources, as indicated in Ten-Year Capital Improvement Program, and the District requires assistance in identifying and structuring external funding opportunities. While the passage of Measure C in 2002 enabled the District to greatly improve facilities, the District cannot rely solely on the State for property maintenance. Methods for reducing operating costs will consist of utilizing Federal asset management strategies and incorporating sustainable design, infrastructure, and mobility features into new development and redeveloped properties. The ultimate goal of the overall implementation effort is to create campuses that are less insular and more directly integrated with the surrounding community, both from an economic standpoint and a design standpoint.

**RBF Team Approach** | The RBF Team recognizes that the 2020 District-Wide Program of Work in the *Vision 2020 Facilities Master Plan* identifies alternative land use / entrepreneurial opportunities for each of the District campuses and establishes guidelines to ensure that any proposed individual projects will align with and support the District's overall long-range vision. Our approach to providing assistance would include prioritizing development efforts based upon potential revenue streams and ease of implementation; preparing alternative scenarios for consideration; and performing the comparative financial analysis, market analysis, and outreach to investors in order to bring private capital to each proposed transaction. In addition, we would assist in arranging ground leases, joint venture partnerships, construction management, and on-going project management and maintenance.

**Knowledge of Proposed Entrepreneurial Project Types** | Our team is experienced with providing planning, design, and construction services to nearly all of the proposed entrepreneurial projects proposed in the District's *Vision 2020 Facilities Master Plan* which include Commercial/Retail Centers, Sports Complexes, Student Housing, Mixed-Use Development, and Educational Facilities. Led by RBF's Director of Asset Management, **Mr. John Kelterer**, our team of in-house professionals brings value to the District through unmatched financial credentials, cost-effective management of projects from concept to completion, and a deep knowledge of project type intricacies.

*RBF has the experience, resources and management capabilities to provide Asset Management services almost every type of educational facility.*



*Track and Soccer Field  
at California State  
University, San Marcos*



*San Diego State University  
Student Housing*

## Director of Asset Management

RBF recognizes that the successful delivery of a revenue-generating projects starts with assigning a strong Project Director who possesses superior asset management and financing capabilities, project management and leadership skills, and a keen team-building capability for multi-agency and multi-discipline projects; and who is responsive to the needs of the District. RBF has selected **Mr. John Kelterer, to serve as Director of Asset Management** based upon his broad background leading asset management projects throughout Southern California. Mr. Kelterer's resume is provided on Page 6.

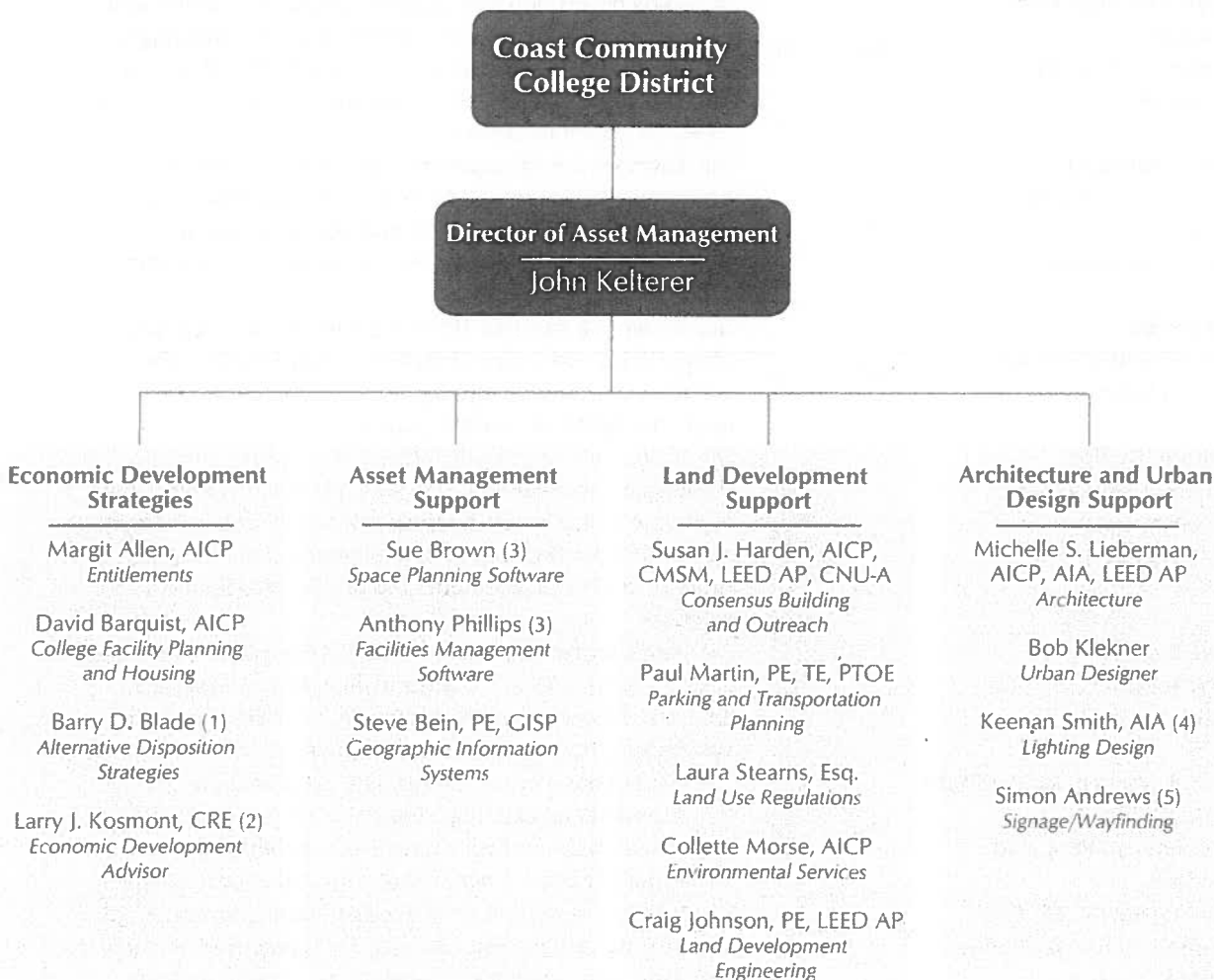


*Mr. Kelterer possesses superior asset management and financing capabilities and is the Founder and Director of RBF's Asset Management Group.*

## Key Personnel

Selection of qualified key team members to work with the Director of Asset Management is key to successfully implementing and sustaining a proven project approach. Mr. Kelterer has identified highly qualified and respected personnel to assist him in providing asset management services to the District. The chart below illustrates RBF Team's organization. The table on the following page identifies each team member's respective role, years of experience, availability, and relevant qualifications.

### Organization Chart



Subconsultants: 1. Property Consulting for Schools 2. Kosmont Companies 3. Michael Baker, Jr. 4. City Lights Design 5. Graphic Solutions

## The RBF Team: Relevant Qualifications and Availability

	Key Individual Name / Role	Avail. (%)	Year of Exp.	Relevant Qualifications
Economic Development Strategies	<b>John Kelterer</b> Director, Asset Management	75%	35	Mr. Kelterer is an experienced Asset Manager with a distinguished record of hands-on management of consultant teams who provide planning, entitlement, environmental, financing, governmental relationships, and legal services.
	<b>Margit Allen, AICP</b> Entitlements	30%	25	Ms. Allen has a wide range of planning experience encompassing a broad array of planning projects including Specific Plans, General Plans, Design Guidelines, Development Feasibility Analysis, and Entitlement processing. She specializes in military base re-use projects.
	<b>David Barquist, AICP</b> College Facility Planning and Housing	50%	16	Mr. Barquist focuses his efforts on planning policy analysis and housing planning with an emphasis on economic development. Before joining RBF, David managed a consultant team for the development of the Facilities Master Plan for California State Polytechnic University, Pomona.
	<b>Barry D. Blade</b> Alternative Disposition Strategies <i>Property Consulting for Schools (PCS)</i>	40%	40	Mr. Blade serves as a consultant to educational institutions providing disposition strategies for closed or underutilized properties, management of a planning and engineering team for re-use of properties, determination of highest and best use, coordination committee meetings, and coordination with cities within school districts.
	<b>Larry J. Kosmont, CRE</b> Economic Development Advisor <i>Kosmont Companies</i>	5%	36	Mr. Kosmont is a nationally-recognized real estate and economic development advisor to public agencies and private organizations. His career encompasses negotiations, development, and management of real estate transactions exceeding \$10 Billion.
Asset Management Support	<b>Sue Brown</b> Space Planning Software <i>Michael Baker, Jr.</i>	25%	18	Ms. Brown is a certified TRIRIGA professional experienced in the Facilities and Information Technology industry. Her experience includes project planning, scheduling, and implementation of TRIRIGA projects.
	<b>Anthony Phillips</b> Facilities Management Software <i>Michael Baker, Jr.</i>	25%	21	Mr. Phillips is a certified TRIRIGA professional experienced in the design, development, and implementation of electronic hardware and software systems. He specializes in Enterprise application development and implementation of service request, space management, and project management solutions.
	<b>Steve Bein, PE, GISP</b> Geographic Information Systems	10%	25	Mr. Bein's project experience includes Geographic Information Systems (GIS); Civil and Transportation Engineering; GIS analysis, master planning, needs analysis, database design, system specification and selection, training, and operation.
Land Development Support	<b>Susan J. Harden, AICP, CMSM, LEED AP, CNU-A</b> Consensus Building and Outreach	20%	18	Ms. Harden has a broad background in community development and planning. She has a particular focus on community-based planning processes, developing innovative public participation programs for a myriad of project types.
	<b>Paul Martin, PE, TE, PTOE</b> Parking and Transportation Planning	50%	12	Mr. Martin is experienced in transportation planning, traffic engineering, and parking analysis. He is practiced at working with land use planning professionals to develop and refine proposed land use plans and site plans to increase mobility for multiple users of an integrated transportation circulation system.

Key Individual Name / Role		Avail. (%)	Year of Exp.	Relevant Qualifications
Architecture and Urban Design Support	<b>Laura Stearns, Esq.</b> Land Use Regulations	25%	21	Ms. Stearns' professional experience in law and planning over the past 20 years includes significant experience in writing zoning codes, development regulations for specific plans, and design guidelines. She has a strong interest in how regulations shape the physical space where we live, learn, and work.
	<b>Collette Morse, AICP</b> Environmental Services	10%	26	Ms. Morse has prepared environmental documents (CEQA and NEPA) for policy plans, mixed-use developments, high-rise office, commercial, residential, industrial, schools (elementary, high school, and colleges/universities), hospitals, and redevelopment projects for both public and private sector clients throughout California.
	<b>Craig Johnson, PE, LEED AP</b> Land Development Engineering	20%	25	Mr. Johnson has over two decades of experience in land development design, mapping, and surveying. He currently is actively involved in the development of master planning and improvement plans for educational, commercial, institutional, and resort projects.
	<b>Michelle S. Lieberman, AICP, AIA, LEED AP</b> Architecture	30%	9	Ms. Lieberman brings to RBF both public and private sector experience. Before joining RBF, Ms. Lieberman worked for a public agency's planning department, where she focused on current planning.
	<b>Bob Klekner</b> Urban Designer	30%	35	Mr. Klekner is a recognized expert in public space design, streetscape enhancement programs, urban design master plans, historic downtown revitalization, and signage and wayfinding studies.
	<b>Keenan Smith, AIA</b> Lighting Design <i>City Lights Design</i>	40%	31	Mr. Smith focuses on the thoughtful making and integration of architecture, urban design, and community planning. He serves as adjunct faculty at two universities and recently completely work on the CCCD Maritime Center.
	<b>Simon Andrews</b> Signage/Wayfinding <i>Graphic Solutions</i>	10%	35	Mr. Simon specializes in discovering those visual elements which are unique to a community, then interpreting them graphically so they communicate an appropriate identity and serve as an effective brand for that community.

## Resume

### John C. Kelterer | Director of Asset Management

Founder and Director of RBF's Asset Management Group. Prior to joining RBF, Mr. Kelterer founded Benchmark Development Company in 1999 as a successor company to RSM Management, where Mr. Kelterer served as its President and CEO since its inception in 1995. Benchmark was the Master Developer of a 5,000-acre master planned community known as Rancho Santa Margarita located in South Orange County, California. Rancho Santa Margarita had in excess of 15,500 residential units, 7.5 million square feet of commercial, industrial and retail space, and numerous parks, walking trails, and recreational amenities. Mr. Kelterer originally financed the project in 1985, while at Merrill Lynch, and was asked by the institutional investors (Copley Real Estate Advisors on behalf of New England Mutual Life and Harvard Capital) to return to the project in 1995 to finish the buildout. At the time, the project was severely overfinanced, sales had dwindled to a few, and other serious problems existed, which caused the investors to take the project back. Since that time, in excess of \$135 million in debt has been repaid; public financial instruments were restructured; illiquid partnerships were terminated; overhead was cut to manageable levels; adjustments (including re-entitlements) were made to the business plan to increase revenue; and assets were sold in an orderly manner. When the project concluded in 2003, the investors received over \$100 million in net distributions. These distributions were after the payoff of all debt as well as the complete return of capital and preferences.

#### Relevant Experience:

- **California State University, Fullerton** | Served as a consultant to CSU Fullerton on real estate matters. This included analysis and representing the university in the acquisition of land from Lennar at El Toro for a permanent South Orange County Campus. In addition when acquisition stalled, assisted in locating an alternative site in Irvine. Represented the University on the joint task force with the City of Fullerton Redevelopment Agency for the planning and development of the Specific Plan incorporating the Hope University campus and surrounding parcels. In addition, evaluated the acquisition of apartment units to be constructed on Chapman Ave by a Campus Housing company and acted as a consultant for the University on other sites which were considered acquisition opportunities. This included negotiation with sellers and helping to draw up purchase and sale agreements.
- **Rancho Santa Margarita** | On behalf of Equity Investors (Copley Real Estate Advisors, MetLife, Harvard Capital) and Banks (Wells Fargo, Bank of America, First Interstate) managed the development of the master-planned mixed-use community of Rancho Santa Margarita. All of the debt (in excess of \$150 million) was repaid as well as the capital and preferences to the investors. In excess of \$100 million was distributed after all debt and equity payments. In the process bond issues were refinanced and development partnerships concluded and liquidated.
- **Oxnard** | As managing partner, entitled and sold Seabridge, a mixed-use project in Oxnard, comprising 704 residential units, 186,000 square feet of commercial, new harbor channels, and 540 private and public boat slips. Managed the consulting team, the financing, and achieved approval from the California Coastal Commission. Project was sold to D.R. Horton.
- **San Mateo** | Representing the California Water Service Company in developing its real estate assets. Currently working on a project in San Mateo that will include development of a new Divisional office and a lot split to accommodate an additional usage on the current site.
- **Perris** | On behalf of the Coudures family, a century old Perris farming family, securing entitlements for a 340 acre parcel to include 1,860 residential units, 1,300,000 square feet of commercial uses, and recreational amenities that include a sports park and recreational lake.
- **Higher Education Teaching Experience** | 10-year experience teaching The Real Estate Development Process in the Merage Graduate School of Business, University of California, Irvine.



Proposal for

**Advisory Services for Asset Management  
of District-Owned Land** RFP # 2004

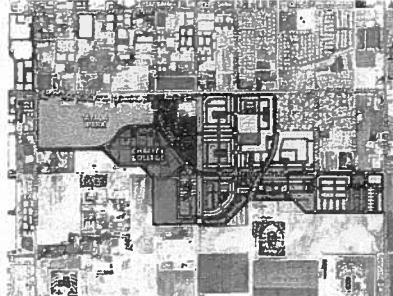

Page 6

**Coast Colleges**  
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## Relevant Previous Engagements

The following pages provide a small sample of previous engagements similar in nature to the asset management services being requested by the District.

Project Name and Highlights	Project Summary
<p><b>College Park Master Planned Community</b> Chino, CA</p> <p><b>Highlights:</b></p> <ul style="list-style-type: none"> <li>• State of California Surplus Land Transferred to City of Chino, Chaffey Community College District, and SunCal</li> <li>• Environmental Issues: <ul style="list-style-type: none"> <li>- Relocation of Burrowing Owls,</li> <li>- Detention Ponds</li> </ul> </li> <li>• 710 Acres</li> <li>• Approximately 2,200 Residential Units</li> <li>• Themed Boulevard with Pedestrian Courtyards</li> <li>• Community Outreach</li> <li>• Specific Plan Preparation</li> <li>• General Plan Amendment</li> <li>• Builder-level Design Guidelines</li> <li>• Conveyance Maps</li> <li>• Tentative and final Subdivision Maps</li> <li>• Improvement Plans</li> <li>• Survey</li> <li>• Construction Management</li> </ul>	<p>The College Park Master Planned Community includes a mixed-use traditional community with the character and ambience of a small college town. Anchored by the 100-acre Chaffey College campus and 140-acre Ayala Park, the community design for College Park is unique in that commercial/residential, institutional, and regional recreational land uses are centrally located within the village center, conveying a sense of permanence and continuity. The project sits on what was formally land owned by the State of California's Chino Men's Prison (CIM).</p>  <p>RBF was responsible for planning and entitlement that included preparation of a Project Specific Plan, Tentative Tract Maps, Finance Maps, and Design Guidelines. In addition, RBF served as the Civil Engineer for the Master Developer, SunCal Companies, and was responsible for producing rough grading, street, storm drain, sewer, water, and recycled water plans for all public streets within the Project. RBF also provided technical support including on-site detention basin design, regional drainage improvements, and off-site street and sewer improvement plans.</p> <p>One unique element of the project involved the utility and facility relocations. The existing CIM prison infrastructure that was within the College Park site was required to be moved without disrupting CIM operations. These relocations included access roads, raw water lines, domestic water lines, electrical facilities, and a prison guardhouse. RBF's engineers and construction managers worked closely with CIM officials to design systems that served their needs, and implemented them as not to disrupt day-to-day operations.</p>
<p><b>Cypress School District Surplus Property Services</b> Cypress, CA</p> <p><b>Highlights:</b></p> <ul style="list-style-type: none"> <li>• Entitlement, land planning, and environmental analysis for three closed school properties</li> <li>• Multiple community workshops related to proposed re-use of properties</li> </ul>	<p>RBF is presently under contract to the Cypress School District to provide entitlement, land planning, and environmental analysis for three closed school properties (two elementary school sites and the district office property) in the City of Cypress.</p>  <p>The Cypress School District is faced with a combination of declining enrollment and declining funding for its school programs. The District has identified three properties for potential reuse either by sale, exchange, or lease. RBF is providing a range of services for the district in support of their actions to re-use these sites. RBF work efforts include:</p> <ul style="list-style-type: none"> <li>• Preparation of base mapping and baseline information on the properties;</li> <li>• Preparation of lotting studies for potential single family residential uses;</li> </ul>

(summary continued on next page)

## Project Name and Highlights

## Project Summary

- Conducting a series of five community workshops related to the proposed re-use of the properties;
- Preparation of technical studies for use in the environmental analysis of the proposals, including noise, air quality, and hydrology/water quality.
- Preparation of Tentative Tract Maps for each site and a Specific Plan document which will include land use, circulation/infrastructure plans, and development regulations.
- Preparation of CEQA documentation.
- Processing of applications through the City of Cypress

### Pennsylvania State University State College, PA

#### Highlights:

- Customized processes and GUIs
- Automated task customization
- Provided documentation, and support
- Developed Crystal Reports

In order to manage their design and construction projects, Pennsylvania State University's (PSU) Office of Physical Plant (OPP) selected Baker to implement TRIRIGA ProjectTM version 9.5

application. Baker partnered with PSU for the successful configuration, enhancement and implementation of the application. ProjectsTM is used to track project funding, contracts, budgets and

expenditures against entire programs and individual projects. On an annual basis OPP manages approximately 10,000 projects, ranging from renovations to construction of new buildings. With an increased need for oversight and reporting, OPP had a need to develop additional ProjectsTM functionality, which consisted of enhancing the existing configuration by developing features to manage and report on all aspects of project financials. This additional functionality has been included in the Out-Of-Box (OOB) TRIRIGA application since version 9.7.



An overview of Baker's involvement in this effort included the following:

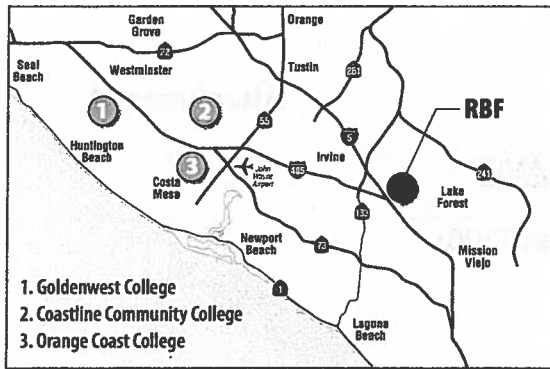
- Upgrade TRIRIGA from version 8i to version 9
- Requirements Definition
- Application Configuration
- Application Implementation and Training
- Application Support

### University of La Verne - Residential Hall La Verne, CA

Kosmont was retained by the University of La Verne in La Verne, California to assist it in the evaluation of the proposed construction and delivery of a new 378 bed on-campus residential hall and book store. Kosmont assisted the University in evaluating a turnkey design build solution by providing financial analyses, decision modeling, and program management activities. A development partner was subsequently selected, and the ground-breaking ceremony for the new four-story building occurred March 31, 2011.

### Los Angeles Department of Water and Power Strategic Real Estate Plan Los Angeles, CA

Kosmont has been retained by the Los Angeles Department of Water and Power (LADWP) to prepare a Strategic Real Estate Plan for extensive property holdings in Los Angeles County. The plan includes the identification of properties that have been deemed to be "Surplus" and provides strategies for divesting of these properties in a way that maximizes value gain. The plan also addresses efficiencies that can be gained through consolidation of LADWP operations.



## Location

### Proximity of Local Office

Located less than 30 minutes to each of the Districts Campuses, the RBF team is able to immediately respond to Asset Management project needs. RBF Consulting's headquarters is located at **14725 Alton Parkway, Irvine, CA 92618.**

## Costs

Hourly rates for RBF Team members are provided for key individuals proposed to support the District. Staff from each firm's respective offices are available to support the RBF Team's key individuals as-needed by the District. The District requested rates for services described in its RFP; however, based on the complex and fluid nature of the services requested, the RBF Team is unable to provide accurate rates with this submittal.

Key Individual Name / Role	Hourly Rate	Key Individual Name / Role	Hourly Rate
<b>John Kelterer</b> Director, Asset Management	\$300	<b>SUBCONSULTANTS</b>	
<b>Margit Allen, AICP</b> Entitlements	\$190	<b>Barry D. Blade</b> Alternative Disposition Strategies <i>Property Consulting for Schools (PCS)</i>	\$165
<b>David Barquist, AICP</b> College Facility Planning and Housing	\$165	<b>Larry J. Kosmont, CRE</b> Economic Development Advisor <i>Kosmont Companies</i>	\$225
<b>Steve Bein</b> Geographic Information Systems	\$240	<b>Anthony Phillips</b> Facilities Management Software <i>Michael Baker, Jr.</i>	\$145
<b>Susan J. Harden, AICP, CMSM, LEED AP, CNU-A</b> Consensus Building and Outreach	\$173	<b>Sue Brown</b> Space Planning Software <i>Michael Baker, Jr.</i>	\$137
<b>Paul Martin, PE, TE, PTOE</b> Parking and Transportation Planning	\$163	<b>Keenan Smith, AIA</b> Lighting Design <i>City Lights Design</i>	\$125
<b>Laura Stearns, Esq.</b> Land Use Regulations	\$125	<b>Simon Andrews</b> Signage/Wayfinding <i>Graphic Solutions</i>	\$120
<b>Collette Morse, AICP</b> Environmental Services	\$190		
<b>Craig Johnson, PE, LEED AP</b> Civil Engineering	\$200		
<b>Michelle Kou, AICP, AIA, LEED AP</b> Architecture	\$105		
<b>Bob Klekner</b> Urban Designer	\$118		

**NONCOLLUSION AFFIDAVIT**

(Public Contract Code Section 7106)

State of California

ss.

County of Orange

Douglas J. Frost being first duly sworn, deposes and says that he or she is Exec. V.P. & CFO of RBF Consulting, the party making the foregoing bid, that the bid is not made in the interest of, or on behalf of, any undisclosed person, partnership, company, association, organization, or corporation; that the bid is genuine and not collusive or sham; that the bidder has not directly or indirectly induced or solicited any other bidder to put in a false or sham bid, and has not directly or indirectly colluded, conspired, connived, or agreed with any bidder or anyone else to put in a sham bid, or that anyone shall refrain from bidding; that the bidder has not in any manner, directly or indirectly, sought by agreement, communication, or conference with anyone to fix the bid price of the bidder or any other bidder, or to fix any overhead, profit or cost element of the bid price, or of that of any other bidder, or to secure any advantage against the public body awarding the contract of anyone interested in the proposed contract; that all statements contained in the bid are true; and, further, that the bidder has not, directly or indirectly, submitted his or her bid price or any breakdown thereof, or the contents thereof, or divulged information or data relative thereto, or paid, and will not pay, any fee to any corporation, partnership, company, association, organization, bid depository, or to any member or agent thereof to effectuate a collusive or sham bid.

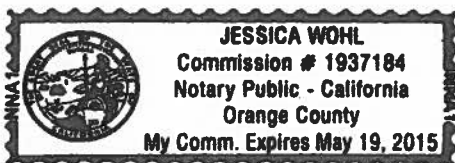
Douglas J. Frost  
Signature of Bidder

Douglas J. Frost  
Print Name

**NOTARY FOR NONCOLLUSION AFFIDAVIT**

Subscribed and sworn to (or affirmed) before me this 11<sup>th</sup> day of January, 2011 2

Jessica Wohl  
Signature of Notary  
[SEAL OF NOTARY]



Jessica Wohl  
Typed Name of Notary

**DRUG-FREE WORKPLACE CERTIFICATION**

This Drug-Free Workplace Certification is required pursuant to Government Code Sections 8350, et seq., the Drug-Free Workplace Act of 1990. The Drug-Free Workplace Act of 1990 requires that every person or organization awarded a contract for the procurement of any property or services from any State agency must certify that it will provide a drug-free workplace by doing certain specified acts. In addition, the Act provides that each contract awarded by a State agency may be subject to suspension of payments or termination of the contract and the contractor may be subject to debarment from future contracting, if the state agency determines that specified acts have occurred.

Pursuant to Government Code Section 8355, every person or organization awarded a contract from a State agency shall certify that it will provide a drug-free workplace by doing all of the following:

a) Publishing a statement notifying employees that the unlawful manufacture, distribution, dispensation, possession or use of a controlled substance is prohibited in the person's or organization's workplace and specifying actions which will be taken against employees for violations of the prohibition;

b) Establishing a drug free awareness program to inform employees about all of the following:

- 1) The dangers of drug abuse in the workplace;
- 2) The person's or organization's policy of maintaining a drug-free workplace;
- 3) The availability of drug counseling, rehabilitation and employee-assistance programs;
- 4) The penalties that may be imposed upon employees for drug abuse violations;

c) Requiring that each employee engaged in the performance of the contract be given a copy of the statement required by subdivision (a) and that, as a condition of employment on the contract, the employee agrees to abide by the terms of the statement.

I, the undersigned, agree to fulfill the terms and requirements of Government Code Section 8355 listed above and will publish a statement notifying employees concerning

(a) the prohibition of controlled substance at the workplace, (b) establishing a drug-free awareness program, and (c) requiring that each employee engaged in the performance of the contract be given a copy of the statement required by Section 8355(a) and requiring that the employee agree to abide by the terms of that statement.

I also understand that if the DISTRICT determines that I have either (a) made a false certification herein, or (b) violated this certification by failing to carry out the requirements of Section 8355, that the contract awarded herein is subject to suspension of payments, termination, or both. I further understand that, should I violate the terms of the Drug-Free Workplace Act of 1990, I may be subject to debarment in accordance with the requirements of Section 8350, et seq.

I acknowledge that I am aware of the provisions of Government Code Section 8350, et seq. and hereby certify that I will adhere to the requirements of the Drug-Free Workplace Act of 1990.

RBF Consulting  
NAME OF CONTRACTOR

Katherine Burdick  
Signature

KATHERINE BURDICK  
Print Name

Sr. VP Human Resources  
Title

1-11-2012  
Date