

Cal Poly Pomona

Request for Qualifications for Lanterman Development Center – Land Development Consultant

ADDENDUM 1

The following revisions, additions and clarifications shall be incorporated in the Request for Qualifications referenced above. All other provisions of the Request for Qualifications shall remain unchanged.

Replace “Section 3. SCOPE OF SERVICES and COLLABORATION” with the following text.

The prime consultant and the team of experienced consultants shall assist the campus in determining development opportunities and challenges for the Lanterman property and provide an informed decision to the campus administration on whether to retain the property. The campus, through the effort of this analysis must establish a baseline due diligence and financial analysis (income/expense) to determine the feasibility of developing the land. We seek to engage a predevelopment team who understands the process and preferably has experience in working with institutions of higher learning developing land similar to the Lanterman property.

The consultant team should be comprised of collective individuals with expertise in land development, real estate, project financing, architecture and historical resource preservation, campus planning and urban design, civil engineering, geotechnical engineering, cost estimating and modeling, landscaping architecture and other consultants deemed necessary to appropriately analyze the development opportunity.

The consultant team’s analysis and recommendation for development opportunities should consider Cal Poly Pomona’s educational mission. Potential developments should be viewed as contributing qualitatively and / or quantitatively to the University mission and philosophy to be student-centered, faculty and staff-focused and community minded. All potential projects should consider a wide range of self-support for their development, operations, and potential revenue streams to CPP. No funding from CPP is available for projects. CPP is interested in the consultant team’s experience at developing successful creative solutions and successful partnerships (private entities, municipalities, state agencies, transit authorities, etc.) which will help shape the Lanterman site.

The due-diligence process and analysis will require interactive meetings, sessions, workshops with key campus/community constituents including, but not limited to:

- President’s Cabinet and other key administrative units
- Campus’ Urban Land Institute Committee (ULI) and Technical Assistance Panel (TAP) representatives
- Community Leaders
- SHPO and other state agencies

The base case due-diligence and financial work will include the following:

- Market Study
- Site Inventory
 - Civil, Geotechnical and Historic Resources, (Significance, Condition, Size)
- Land Planning and Urban Design
- Conceptual Architecture/Landscaping Imagery
- Cost Modeling and Estimating
- Financial Analysis
 - Including highest-and-best use analysis considering CPP’s strategic direction for the site

The final deliverables for the consultant team will include the following:

- Presentations to CPP and project stakeholders.
- Land Development Plan Report
 - Executive Summary of findings and recommendations in the creation of this unique campus environment
 - Strategic drivers for the site and analysis
 - Creative and organized land-use plan for the site by parcel / area, utilizing the following detailed analyses
 - Market based demand for asset types to be developed on site
 - Concept development standards and sample imagery for each parcel / area
 - Cost modeling and estimates for each parcel / area including all project related costs (inclusive of demolition, renovation, site work)
 - Development / asset type options recommended and projected planning and financial potential for parcel / each area (including on connections to strategic drivers and CPP mission)
 - Highest-and-best use analysis for each parcel / area
 - Stakeholders to engage for each parcel / area (CPP, municipalities, state agencies, transit authorities, etc.)
 - Risk evaluation for each parcel / area based on CPP strategic drivers, market demand, development opportunities, revenue streams, needed stakeholders, etc.
 - Financial plan / pro forma for the development of the Lanterman Development Center
 - Exhibits to include:
 - Inventory of structures on site (size, age, replacement cost, hazardous materials, etc.)
 - Market study data
 - Cost modeling and estimating data
 - Financial models
 - Documentation of planning process, timelines, and decisions
 - Final conceptual imagery

Key questions asked of the Urban Land Institute's review team will be beneficial as this land development study commences. These key questions will coincide with the scope of work of this study and include:

- What are the issues and opportunities impacting the redevelopment of the historic Lanterman site? What is the feasible re-purposing of the site that preserves the site's recognized historic structures and creates a financial return for the property owner?
- What interim and long-term uses can be envisioned for the site that will generate revenues to cover projected operating expenses or provide positive cash flow to the University?
- How can the user experience be improved (e.g. entrances, parking, mix of uses, design)? How should the surrounding arterials be improved to enhance the environment? What connective mobility "linkages," such as ingress/egress, walkways and bicycle lanes, should be considered? What alternatives and strategies can be developed to provide rail or bus connections to the campus so that users of the site do not have to rely on their private vehicles for access?
- Which land use/development opportunities that directly further CPP's academic mission (program, administration, courses, agriculture, etc.), should be considered for the site which will distinguish Lanterman as the unique "Campus"?
- Which land use/development opportunities can indirectly further the academic mission by providing a long-term revenue stream (ground lease, bond), should be considered at Lanterman?
- What are the feasible economic tools that could be used for the adaptive re-use of this site (e.g. grants, tax credits, assessments, bonds, etc.)?
- How can the future use of the site support or complement the economic development strategies of the area and/or region? What opportunities exist for public/private partnerships?

Replace "Section 5. RFQ SUBMITTAL CONTENT, FORMAT, and QUALIFICATIONS Tab 7" with the following text:

Tab 7. Fee Structure:

Provide a range of estimated fees and hourly rates with the line items for consultants and a proposed schedule for compensation. Include any anticipated reimbursable expenses based on your prior experience and scope projected here.

Note: This fee range will only be used as a beginning point for negotiation in the event your firm is selected. A detailed scope and fee proposal is anticipated to be submitted with a Request for Clarification & Proposal discussed in Section 6.

Add the following text after “Section 5. RFQ SUBMITTAL CONTENT, FORMAT, and QUALIFICATIONS – Qualifications”:

Contract

The selected consultant team will enter into an agreement with Cal Poly Pomona for this planning effort. The contract will be the standard California State University Service Agreement which is provided as Exhibit A for reference. Submission of qualifications for this RFQ indicates agreements and acceptance of all terms and conditions within the California State University Service Agreement.

Replace “Section 6. SELECTION PROCESS and CRITERIA” with the following text:

All Qualifications will be examined for merit and ranked by the selection committee according to quality and responsiveness. Successful Qualification Statements will be placed on a shortlist, and it is the intention of the University to invite 2-3 firms for interviews where the above qualifications will be further discussed.

Cal Poly Pomona will issue a Request for Clarification & Proposal to the shortlisted 2-3 firms. This request will include additional information regarding the Lanterman Development Center as well as detailed responses by the firms for the anticipated scope of services, detailed project timeline, fees and expenses, roles, responsibilities, and experience of the team members. Responses to this Request for Clarification & Proposal will be evaluated along with the in-person interviews when determining the preferred planning team.

The selection committee seeks project teams exhibiting strong campus land development planning skills and has demonstrated experience with comparable consulting services at large higher education institutions.

Major considerations in the team/firm selection will be based upon the following criteria.

1. Demonstrated firm experience in a university setting.
2. Expertise in Planning, Development and financial feasibility.
3. Development approach.
4. Experience of the team members.
5. Management plan with specific timelines.
6. Familiarity with relevant examples of universities developing property for revenue generation in California.

Replace “Section 7. RFQ PROCESS and INSTRUCTIONS Item A. Qualification Submission Deadline” with the following text:

A. Qualification submission deadline:

Statements of Qualifications in response to this RFQ are due by 4:30 pm on November 16, 2016. Facilities Planning, Design and Construction at the following address: California State Polytechnic University, Pomona, Vice President for Administrative Affairs, Bldg. 98, 3801 West Temple Avenue, Pomona, California 91768, Attention: Danielle Manning.

Replace “Section 7. RFQ PROCESS and INSTRUCTIONS Item C.” with the following text:

C. Lanterman Site Visit:

Firms interested in visiting the Lanterman site will be afforded opportunities to visit the site at the following dates and times:

- 9am-11am November 3, 2016
- 9am-11am November 4, 2016
- 9am-11am November 7, 2016
- 9am-11am November 8, 2016

Any visit will be drive-through only. Please note that existing tenants and other activities are currently on site and should not be disturbed. At this time CPP will not be providing access to any of the structures on site. Visitors to the site should not attempt to access any structures. Interested firms should contact Talitha Tyler at (909) 979-6844 or ttyler@cpp.edu to arrange the site visit and receive details. CPP will coordinate with the selected consultant team to provide more detailed tours or access as needed as work commences.

Replace “Section 8. PROPOSED SCHEDULE and KEY DATES” with the following text:

In order to maximize the time for the planning firm / team to complete their analysis, the anticipated has been modified as follows:

Issuance of RFQ	October 10, 2016
Issuance of Addendum 1	October 27, 2016
Optional Lanterman Site Visits	9am-11am November, 3, 4, 7, 8, 2016
Qualifications Submittals Due	4:30pm November 16, 2016
Shortlist Notification	November 23, 2016
Request for Clarification & Proposal and Interview Instructions	November 23, 2016
Clarification & Proposal Submittals Due	4:30 pm December 9, 2016
On-Campus Interviews	December 15, 2016
Finalize Scope of Services	December 20, 2016
Agreement Executed and Award of Contract	December 31, 2016
Kick-Off and Beginning of Analysis	January 3, 2017
Draft Report and Presentation of Plan and Recommendations	May 26, 2017
Final Report and Presentation of Plan and Recommendations	June 16, 2017
Board of Trustees Presentation (By Cal Poly Pomona)	July 18, 2017

Add the following section and text to the RFQ: “Section 9. GENERAL CONDITIONS”

Cal Poly Pomona reserves the following specific rights, without limitation, with respect to SOQs:

- The right to waive any irregularities or technical difficulties in the submission process
- The right to reject any SOQ that the University deems incomplete or unresponsive and the right to reject all SOQs
- Accept or reject Statements in their entirety or in part
- Consider more than one respondent
- The right to afford unsuccessful Respondents an opportunity to enter into backup contracts in an order of priority determined by the University in its sole discretion
- Request additional information from respondents
- Modify the scope of the services during the procurement process

This RFQ does not commit or bind the University to enter into a contract or proceed with the procurement described herein. The University does not assume any obligations, responsibilities, and liabilities, fiscal or otherwise, to reimburse all or part of the costs incurred or alleged to have been incurred by parties considering a response to or responding to this RFQ. All of such costs shall be borne solely by each Respondent.

Add the following section and exhibit to the RFQ:

Exhibit:

A. CSU Service Agreement