

OCTOBER 2016

REQUEST FOR QUALIFICATIONS for
LANTERMAN DEVELOPMENT CENTER –
LAND DEVELOPMENT CONSULTANT

CAL POLY POMONA

Statement of Qualifications due November, 2016
Attn: Danielle Manning

CALIFORNIA STATE POLYTECHNIC UNIVERSITY, POMONA
REQUEST FOR QUALIFICATIONS

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1. INTRODUCTION and BACKGROUND

California State Polytechnic University, Pomona (Cal Poly Pomona), is seeking an experienced prime consultant to assist the campus in determining development opportunities for its Lanterman Development Center. The prime consultant shall assume the responsibility for assembling a team whose members are qualified to perform the necessary baseline due diligence to determine feasibility of developing the property.

The 309-acre parcel of land known formerly as the Lanterman Development Center is located approximately one mile from the Cal Poly Pomona main campus. Once formerly operating as the residential healthcare facility for the mentally disabled, the Lanterman Development Center site contains 131 buildings and structures, totaling over one million square feet. At its height, the facility cared for 2,000 patients. The Center ceased operation in 2015 and Cal Poly acquired Lanterman from the State of California.

The California Department of Finance expects Cal Poly Pomona to decide by September 2017 if it will retain the property or return it to the State, thus making this land study and development analysis vital to Cal Poly Pomona.

2. CAMPUS HISTORY

California State Polytechnic University, Pomona is a public polytechnic university located in Pomona, California. As such, it emphasizes technology, innovation and cross-disciplinary studies. Established in 1938, Cal Poly Pomona offers more than sixty majors and undergraduate and graduate degree programs. The University is comprised of eight academic colleges, with a total student body of approximately 24,000 students. Cal Poly Pomona is one of twenty-three universities that make up the California State University System, the largest public four-year university system in the United States.

In 1938, the Charles B. Voorhis family donated 150 acres of land in San Dimas, which was the former site of the Voorhis School for Boys, to the State of California. In the same year, it became California State Polytechnic University, Pomona (Cal Poly Pomona) founded as a men's agricultural college and operated as a branch in Southern California of Cal Poly San Luis Obispo

In 1949, the Kellogg Ranch was deeded to the State of California for use in the expansion of the education program of California State Polytechnic College. A stipulation of the deed agreement retained the Arabian horse breeding and training program and continued the Sunday horse shows. In 1956, 550 students and 30 faculty members teaching six courses of study moved three miles from the original Voorhis site to the Kellogg campus. Women were enrolled for the first time in 1961, and Cal Poly Pomona

became the 16th state college in 1966, 28 years after its founding. It was officially granted full university status in 1972.

By 1971, as a result of several land transfers and acquisitions, campus acreage had increased by 163 acre. Then in 2015, the university acquired, by transfer, an additional 300 acres from Lanterman Hospital (Lanterman Development Center).



Main Campus

Cal Poly Pomona’s main campus today is nestled in 1,438 rolling acres on the eastern edge of Los Angeles County. As one of only two polytechnic universities in the state, Cal Poly Pomona is known for its learn-by-doing philosophy. The university offers more than 60 majors and degree programs in eight academic colleges.

Lanterman Development Center

The nearly 300 acre Lanterman Developmental Center site became part of Cal Poly Pomona in 2015 when the state transferred jurisdiction of the land to the CSU. The site

contains over 100 buildings formally operated by the Development Center and was constructed at different periods of time over the past 60 years.

The land could be used many ways, including academic, workforce housing, and the creation of a development similar to Innovation Village. The generation of revenue to support University purposes is also an important consideration. The campus president's philosophy calls for being student-centered, faculty and staff-focused and community-minded. Therefore, consultation with the university's neighbors is important and offers an opportunity to advance the academic vision for the university and partner with the local community.

3. SCOPE OF SERVICES and COLLABORATION

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?

4. RELEVANT DOCUMENTS AND RESOURCES

Cal Poly Pomona has already collected various pieces of information for the due-diligence process. A Final Historic Resource Assessment Report for Lanterman Development Center was completed for the California Department of Developmental Services in February 2016.

A history of the Lanterman Development Center stretches from 1927 to 1915. The site is eligible for inclusion in the National Register of Historic Places, the California Register of Historical Resources, and the California Historic landmarks program.

Cal Poly Pomona also asked the Urban Land Institute's Los Angeles District council and Orange County/Inland Empire District council to conduct a preliminary study of findings and recommendations for the Lanterman site. The ULI assembles a Technical Assistance Panel TAP of experts to conduct an intensive analysis in a variety of disciplines. The ULI panel identified constraints and opportunities presented by the Lanterman site and offered recommendations for a process to answer the threshold question of how the property might be developed. The ULI TAP Report is available for review.

Additional information or inputs will be provided by Cal Poly Pomona over the course of the analysis and as they become available or needed.

5. RFQ SUBMITTAL CONTENT, FORMAT and QUALIFICATIONS

Cal Poly Pomona is looking for a prime consultant to assemble a creative, responsive and best qualified team of consultants that will collaborate with the University. Qualifications should be concise and contain a cover letter that highlights the firm and/or team's unique qualifications, and primary point of contact name, telephone number and direct email address.

In order to be considered complete, qualifications should be organized per the sections listed below in sequential order with adequate supporting materials as necessary for the CPP team to make an informed selection.

Tab 1. Cover Letter and Introduction:

Tab 2. Business Information:

Include the following minimal business information of the prime consultant and each sub consultant on your team:

- Company name, address and phone number, history of the firm, etc.
- Name and email of the primary contact
- Federal Tax ID number
- License or Registration number

Tab 3. Qualifications/Team Description and Relevant Professional Experience:

Describe the structure of the proposed team, including consultants, and outline the role and responsibilities for each firm and key personnel. Identify the prime consultant and its responsibilities in facilitating and coordinating the consulting effort. For each proposed team member responsible for this analysis, provide a) history including education, b) licenses, c) references, d) a listing of all projects/studies in which they took part, and their role.

Tab 4. Relevant Experience in Land Development/Planning:

List comparable studies in which team members were involved. Identify the team members involved and their role with each study. Indicate clearly whether the study was completed by the firm or by a team member when employed in another firm. Additional consideration may be given to proposed team members and firms that have successfully worked together on previous studies.

Tab 5. Issues:

Describe your firm's initial impressions of the Lanterman Development Property and identify what you see as significant challenges and opportunities for its development and growth.

Tab 6. References:

Provide names, addresses and email addresses and phone numbers of previous clients who may evaluate referenced work.

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.

Qualifications

Highest consideration will be given to consultants with demonstrated understanding of land development planning for higher education, familiarity with the CSU process and responsiveness to the needs of the CPP campus.

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.

6. SELECTION PROCESS AND CRITERIA

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.

7. RFQ PROCESS and INSTRUCTIONS

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.

B. Submittals shall include five (5) 8-1/2" x 11", hard copies in three ring binders and DVD's or thumb drives of the complete submittal in Adobe PDF format electronic version.

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.

D. Qualification submissions received after the deadline will be considered nonresponsive.

E. For messenger and/or overnight express only: California State Polytechnic University Pomona Vice President for Administrative Affairs, Building 98 3801 West Temple Ave. Pomona, California 91768

Hours of business: Monday through Friday, 8:00 am to 5:00 pm.

8. PROPOSED SCHEDULE and KEY DATES

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

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.

Exhibit:

- A. CSU Service Agreement