



Cal Poly Pomona Request for Clarification for Lanterman Development Center – Land Development Consultant RFC 16-006

A. INTRODUCTION

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.

This Request for Clarification is being provided to several firms shortlisted from Request for Qualifications #16-006. This document will outline the additional information and clarifications requested from proposers. Both the responses from the RFQ and this Request for Clarification (“RFC”) will be factored into the University’s selection process.

B. KEY QUESTIONS

Cal Poly Pomona asked the Urban Land Institute’s Los Angeles District Council and Orange County/Inland Empire District Council (“ULI”) to conduct a preliminary study of findings and recommendations for the Lanterman site. The key questions ULI was asked to address will help guide this pre-development study. Those 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?

C. SOLICITATION AND PROJECT SCHEDULE

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

Shortlist Notification	November 28, 2016
Request for Clarification and Interview Instructions	November 28, 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 23, 2016
Kick-Off and Beginning of Analysis	January 3, 2017
Completion of Phase I: Establish Strategic Objectives and Data Gathering	February 28, 2017
Completion of Phase II: Concept Development	March 31, 2017
Draft Report and Presentation of Plan and Recommendations to Cal Poly Pomona and Chancellor's Office	May 3, 2017
Final Report and Presentation of Plan and Recommendations	June 16, 2017
Board of Trustees Presentation (By Cal Poly Pomona)	July 18, 2017

D. SCOPE OF SERVICES

Cal Poly Pomona envisions that the Land Development Plan will have four phases of effort to develop the final recommendations. The following objectives should be addressed within each phase of work and proposers shall develop an appropriate work plan, narrative, and list of tasks to accomplish these objectives within their Proposal.

Phase I: Establish Strategic Objectives and Data Gathering

Objectives for this phase of work include:

- Development of strategic objectives for the site with University administration and key stakeholders
- Detailed assessment and inventory of existing conditions on the Lanterman Development Center site inclusive of civil, geotechnical, facility condition, historical resources, site infrastructure, etc.
- Market analysis for each asset type / potential project component considered for development on the site
- Outreach to key stakeholders such as local municipalities, transit authorities, and governmental agencies such as SHPO

Deliverables for this phase of work include:

- Regular meetings and presentations to the Project Committee
- Phase I report of findings addressing responses to the above objectives

Phase II: Concept Development

Objectives for this phase of work include:

- Development of at least four different initial concepts based on Phase I
- Cost modeling and highest and best use analysis for each concept



- Outreach to key stakeholders such as community members (University and local), local municipalities, transit authorities, and governmental agencies such as SHPO

Deliverables for this phase of work include:

- Regular meetings and presentations to the Project Committee
- Phase II report of findings addressing responses to the above objectives

Phase III: Concept Refinement

Objectives for this phase of work include:

- Refinement of at least two different initial concepts based on Phase II concepts and feedback
- Detailed financial analysis, cost modeling, and highest and best use analysis for each concept
- Land planning, urban design, and conceptual architecture/landscaping imagery appropriate for the concepts
- Outreach to key stakeholders such as community members (University and local), local municipalities, transit authorities, and governmental agencies such as SHPO
- Regular meetings and presentations to the Project Committee

Deliverables for this phase of work include:

- Presentation of recommended preferred concept and findings to University and Chancellor's Office
- Complete project documentation as outlined within Phase IV: Documentation

Phase IV: Documentation

The University is expecting the following minimums related to a final deliverable and areas to address within a final presentation to the University:

- 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.
 - Identify the opportunities and constraints related to historic resources on site and impact on development of the Lanterman Development Center (proposers are anticipated to coordinate findings with the State Office of Historic Preservation).
 - 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

E. INTERVIEW FOMRAT

Interviews with proposers will be conducted on December 15th, 2016 at Cal Poly Pomona. The interviews will be 60 minutes with 30 minutes for presentation and 30 minutes for discussion. The times, order of proposers, and location will be provided at a later date. The presentation portion should include the following topics:

- Overview of key team members and role on the project (the committee does not need a detailed introduction or explanation of qualifications, but rather an understanding of who your key team members are and their level of involvement with the Project),
- Approach / proposed work plan to complete the project,
- Proposed schedule, identifying risks with achieving the milestones outlined for a June 16, 2017 final report delivery date, and,
- Lessons learned from other projects that are applicable to the Lanterman Development Center planning.

Cal Poly Pomona may provide additional topics or questions to be addressed by each team within the interview. Any additional information or changes to the interview format will be provided no later than December 9, 2016.

F. SCORING

The University has identified the following areas which will be evaluated and scored for selection of the preferred proposer.

- Demonstrated firm experience in a university setting.
- Expertise in Planning, Development and financial feasibility.
- Development approach.
- Experience of the team members.
- Experience with the State Office of Historic Preservation.
- Management plan with specific timelines.
- Familiarity with relevant examples of universities developing property for revenue generation in California.
- Overall response to both the RFQ and RFC.
- Ingenuity of approach and thinking towards the Lanterman Development Center.
- Interview performance.
- Cost of services.
- References of planning team.

G. RFC SUBMITTAL CONTENT, AND FORMAT



In order to be considered complete, proposals 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 with a description of the creative solutions and / or approach your team will bring to the Project.

Tab 2: Approach and Work Plan

- Provide a narrative and detailed list of all tasks, meetings, and deliverables throughout the project.
- Provide a matrix of which individuals and/or sub consultants will be engaged with each task.
- Provide a matrix of percentage of time allocated by all key staff to this project.
- Please identify any optional services that Cal Poly Pomona may wish to consider during this planning effort.

Tab 3: Detailed Schedule by Task and Milestones

Tab 4: Detailed Fee by Phase / Task and Estimated Expenses

H. RFC PROCESS AND INSTRUCTIONS

1. Submittals in response to this RFC are due by 4:30 pm on December 9, 2016. Proposals shall be submitted electronically via email to Talitha Tyler at ttyler@cpp.edu and shall be formatted for 8-1/2" x 11". Hard copies can be provided in addition to the digital version and submitted to 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.
2. Proposal submissions received after the deadline will be considered nonresponsive.

I. GENERAL CONDITIONS

Cal Poly Pomona reserves the following specific rights, without limitation, with respect to Submittals and Clarifications:

- The right to waive any irregularities or technical difficulties in the submission process
- The right to reject any submittal that the University deems incomplete or unresponsive and the right to reject all submittals
- 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 RFC 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 RFC. All of such costs shall be borne solely by each Respondent.



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