

# Economic Development Advisory Board

**July 21, 2015 at 8:00 a.m.**

Winter Park City Hall, Chapman Room  
401 Park Avenue S., Winter Park, FL 32789



## 1 administrative

- a. Approve minutes from 6-16-2015

## 2 action

- a. Notice of Disposal – Progress Point Property
- b. City of Winter Park Commercial Broker

## 3 informational

- a. Visioning update

## 4 new business

## 5 public comment

## adjourn

Next meeting: August 18th

## appeals & assistance

"If a person decides to appeal any decision made by the Commission with respect to any matter considered at such meeting or hearing, he/she will need a record of the proceedings, and that, for such purpose, he/she may need to ensure that a verbatim record of the proceedings is made, which record includes the testimony and evidence upon which the appeal is to be based." (F. S. 286.0105).

"Persons with disabilities needing assistance to participate in any of these proceedings should contact the City Clerk's Office (407-599-3277) at least 48 hours in advance of the meeting."

**CITY OF WINTER PARK  
ECONOMIC DEVELOPMENT ADVISORY BOARD**

**Regular Meeting  
8:00 a.m.**

**June 16, 2015  
Chapman Room**

**MINUTES**

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Meeting was called to order at 8:00 a.m. in the Chapman Room of City Hall.

**BOARD MEMBERS PRESENT:** Stephen Flanagan, John Caron, Owen Beitsch, Kelly Olinger

**BOARD MEMBERS ABSENT:** Marc Reicher, John Gill, Maura Weiner, Patrick Chapin

**STAFF MEMBERS PRESENT:** Dori Stone, Kyle Dudgeon

**ADMINISTRATIVE ITEMS:**

**A. Approval of the April 21, 2015 Minutes**

Motion made by Steve Flanagan, seconded by Owen Beitsch, to approve the April 21, 2015 minutes. Motion passes with unanimous vote.

**B. Election Chair and Vice-Chair**

Motion made by Steve Flanagan, seconded by Owen Beitsch, nominating John Caron as the new Board Chair. Motion passed.

Motion made by Kelly Olinger, seconded by John Caron, nominating Steve Flanagan as the new Board Vice-Chair. Motion passed.

**ACTION ITEMS:**

**A. Business Longevity Awards – ‘A Salute to Business’**

Staff presented a brief update on the program and provided insight as to how the award recipients would be recognized.

Motion made by Steve Flanagan, seconded by Kelly Olinger, to approve the award program. Motion passes with unanimous vote.

**INFORMATION ITEMS:**

**A. Notice of Disposal – Progress Point Property**

Staff provided an update on the property since moving forward with the NOD. Board discussed possible reasons for the lack of response to the NOD.

**B. City of Winter Park Commercial Broker**

Staff provided information regarding the use of a Commercial Broker and discussions were held.

**NEW BUSINESS**

There being no further business, the meeting adjourned at 9:06 a.m.

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John Caron, Chairperson

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Laura Neudorffer, Board Liaison

# Economic Development Advisory Board



meeting date 7-21-15

approved by

item type ☐ Administrative  
☒ Action  
☐ Information

☐ City Manager  
☐ City Attorney  
☐ N/A

**agenda  
item**

## Subject 2a

Per City Commission direction, staff is requesting input from EDAB regarding proposals for the Notice Of Disposal for the 'Progress Point site'.

## **motion | recommendation**

Recommendation to approve, approve with conditions, or not approve the proposal as presented.

## Background

On February 9<sup>th</sup>, 2015 the City Commission authorized staff to proceed with a Notice Of Disposal (NOD) on a city-owned property located at 1150 Orange Avenue and 1210/1211/1241 Palmetto Avenue along the southeast side of Orange Avenue, between Minnesota Avenue and Cypress Avenue.

The city acquired the Progress Point site as part of a land swap with CNL in 2011. It was formerly used by Progress Energy. The site is 3.7+ acres in size and presently has a Future Land Use designation of Professional Office with the appropriate zoning district of O-1. The Comprehensive Plan does highlight this area as a potential Planned Development site with the possibility of a PD-1 future land use and zoning designations. The appraised value of the property in 2011 was \$4.4 million.

At the conclusion of the NOD submission window, the city received one proposal for the property. The proposal requests purchase of the property and construction of a Class A assisted living and memory care center. The proposal consists of a 1 story common area at 12,814 sf, 80 assisted living apartments totaling 58,759 sf, and 32 memory care units at 15,412. The aggregate total of the proposal is 86,985 sf. The proposal does call for .5 acres to be reserved for future development located on the west side of the development near Cypress Avenue.

Staff presented this item at the June 16<sup>th</sup> EDAB meeting as an informational item.

Included as backup is a memorandum from the November 29, 2012 joint-meeting from EDAB and the City's Planning and Zoning Commission discussing potential uses for 'Progress Point'.



CITY OF WINTER PARK

401 Park Avenue South

Winter Park, Florida

32789-4386

# MEMORANDUM

**To:** MAYOR AND COMMISSIONERS  
RANDY KNIGHT, CITY MANAGER  
MICHELLE DEL VALLE, ASSISTANT CITY MANAGER  
JEFF BRIGGS, PLANNING DIRECTOR

**FROM:** DORI STONE, AICP, ECONOMIC DEVELOPMENT/CRA DIRECTOR

**DATE:** DECEMBER 11, 2012

**SUBJECT:** JOINT P&Z/EDAB WORK SESSION ON PROGRESS POINT SITE

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A joint work session with the City's Planning and Zoning Board and the Economic Development Advisory Board was held on November 29, 2012. The purpose of the joint work session was to give both Boards the opportunity to discuss options and preferred uses on the City's Progress Point site. Both Boards have expressed a desire to be included in the early planning/disposition of the property since it was acquired in early 2012.

Staff has been fielding development options on the property since the acquisition in early 2012 and was seeking direction on the next steps prior to taking options to the City Commission.

Staff reviewed the current O-1 zoning and the Office future land use designation and what is permitted under these uses at this time. Staff also reviewed the three alternatives that were prepared as part of the swap as well as reviewing the possibilities that were designed as a potential PD-1 zoning and land use on the site.

Jeff Oris with Planning and Redevelopment Consultants, Inc. facilitated the discussion about the property and the various options available to the city. The discussion began with a review of potential public uses. These include:

- Library
- Post office
- City Administration
- Public Recreation (tennis)
- Educational
- Community Playhouse/Arts
- Permanent Farmer's Market
- Open Space/Park Mitigation



The private uses under consideration include:

- Commercial/Retail – design, mixed dining/retail, stand along restaurants
- Hotel
- Assisted Living
- Apartments
- Office
- Educational facilities
- Some type of joint public/private partnership

Uses that are not preferred are gas stations, stand - alone drug stores or any type of drive through food service.

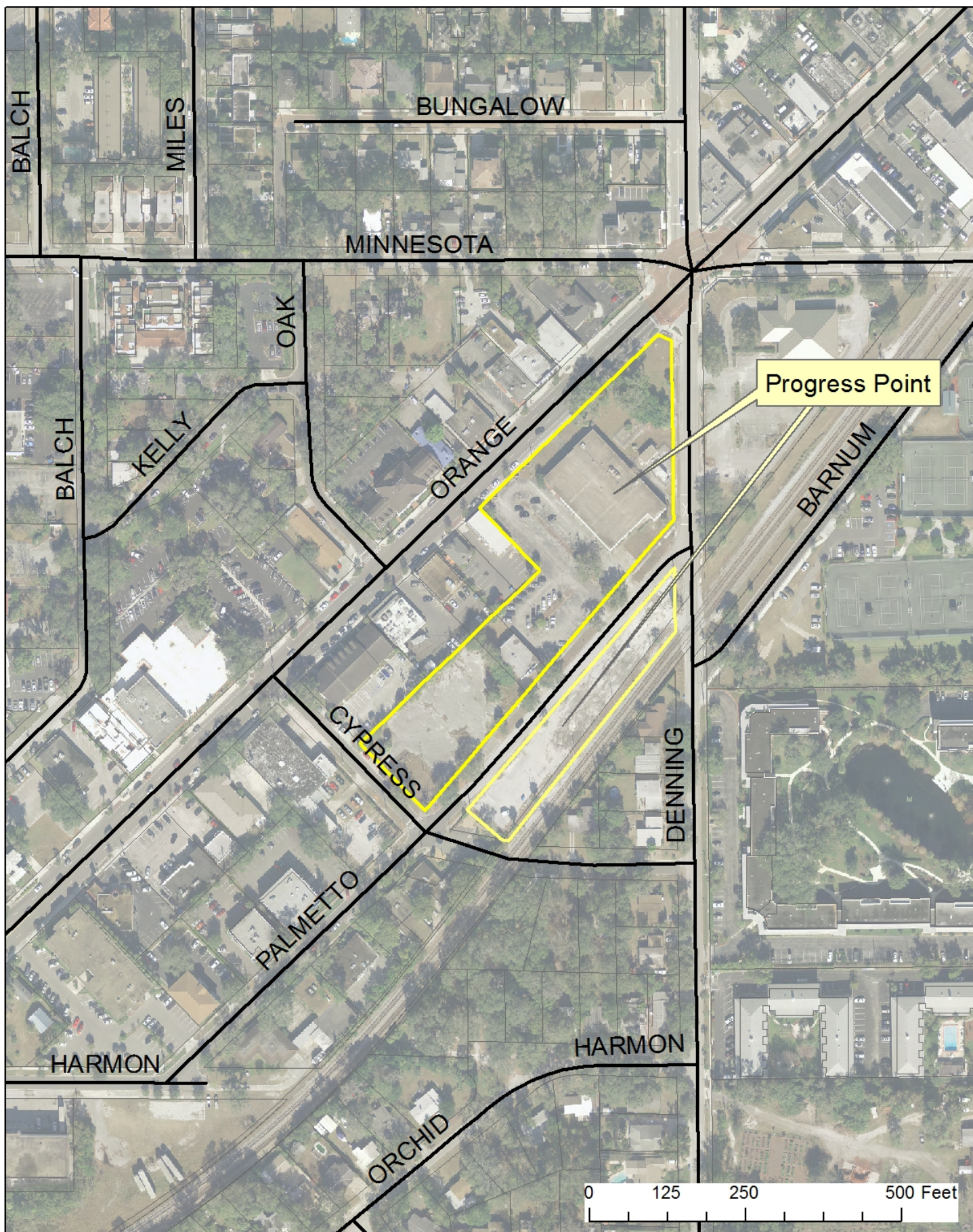
Much of the discussion centers on the type of development pattern. All the Board members present felt that a pedestrian friendly development approach, with some type of a public thoroughfare or canopy would be beneficial to making Orange Avenue more walkable and tying it into the downtown area. Additionally, the option of more intensity with a parking structure was also discussed as well as a preference to two to three stories in height. The Board members also discussed the potential to realign Palmetto Avenue adjacent to the railroad tracks when development occurs to consolidate the properties. Keeping with the pedestrian theme, several board members felt that the project should encourage a sense of a public gathering place – providing a piazza of sorts along Orange Avenue.

The opportunity for a public/private joint development is also available on the site. Both Boards agreed that there are several policy issues that need to be addressed by the Commission:

- Keep the property until the market improves
- Decide if there is a public use of the property, or best to return it to a private use
- Decide when to sell the property
- If selling is the option, what process is used
- Should the city decide to sell, what should the development look like
  - The city should set the development standards
  - The city could rezone to a PD-1 designation as part of the terms
  - The city could require some public component of the deal, whether it's a use or a sense of place

Both Boards are interested in participating in further discussions regarding the redevelopment of the site, subject to a decision by the City Commission to either keep or sell the property.





## Progress Point Site





# ROC Seniors

ROC Seniors Housing Fund Manager, LLC

June 12, 2015

Mr. Randy B. Knight  
City Manager  
City Hall  
401 Park Avenue South  
Winter Park, FL 32789

Re: Revisions to Proposal for acquisition of Progress Point Property

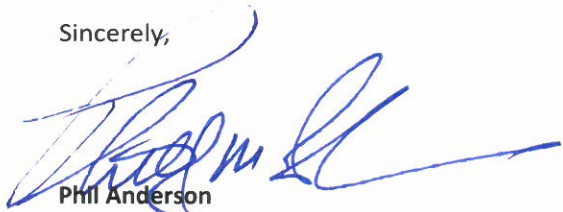
Dear Randy,

It was a pleasure meeting with you and thank you for your insight and additional perspective. We are thrilled about the project's thoughtful combination of uses adding much needed low impact senior's housing, an outstanding and attractive restaurant component with off-street parking while preserving the unique quality of the city. Pursuant to our discussion this morning, we offer the following revisions to our original proposal.

- The land price would be \$4.5M.
- The proposal assumes 32 memory care units and 80 assisted living units in Phase 1 with expansion potential of an additional 32 memory care units for a total of 144 units.
- Site PD rezoning allowing for a FAR in excess of 45%.
- The proposal assumes the Orange Avenue frontage would include a 1000 SF Coffee/Bistro and a 5000 SF restaurant with outdoor dining located on the point at Orange Ave and Denning Drive. The proposal assumes the existing utilities alignment remains in-place and we can build within 10 feet of the utilities.
- Access to Palmetto Ave would remain in a continuous drive parallel to the tracks. Traffic speed controls would be included.
- The design would include a tiered roofline with 1.5, 2 and 3 floors stepped back from Orange Avenue.

We are excited to be considered and look forward to working with your team.

Sincerely,



**Phil Anderson**  
Chief Investment Officer  
ROC Seniors Housing Fund Manager, LLC  
*A subsidiary of Bridge Investment Group Partners, LLC*  
1000 Legion Place, Suite 1600  
Orlando, FL 32801



ROC / LCS

CITY OF WINTER PARK

Progress Point Property Proposal

Date of Opening: May 4, 2015 at 10:00 AM

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“Offer Letter”

April 29, 2015

To the City of Winter Park Mayor and City Commissioners  
c/o Cynthia Bonham  
Office of the City Clerk  
City Hall  
401 Park Avenue South  
Winter Park, FL 32789

Re: Proposal for acquisition of Progress Point Property

Dear Ms. Bonham,

ROC Seniors Housing, Life Care Services, Lamm and Company Partners and Helman Hurley Charvat Peacock / Architects, Inc. have partnered together to present our proposal to develop and operate a distinctive and game changing senior living community that attracts, retains and enhances the lives of seniors in Winter Park.

Our collective history combines the best and brightest in one of the most innovative and exciting industry sectors. We understand creative living spaces, the power of collaboration and partnerships, the strength of strategic alliances with institutions, municipalities, communities, universities and residents. We understand and promote the importance of well-being, lifelong learning, wellness and vibrancy, while providing security, safety and a sense of comfort and commitment for not only our residents, but their families.

**Offer:**

\$3,500,000 - \$4,000,000 depending on site conditions.

No financing contingency.

Closing 30 days after successful rezoning to accommodate at least 112 residences and issuance of pertinent building permits.

**Proposal:**

Construct a Class A quality facility to accommodate an initial phase of at least 112 assisted living and memory care residences. The project would include open courtyards, greenspace and coordinated streetscape. The plan would leave Palmetto Avenue intact and incorporated into the streetscape and parking amenities. The campus would have .5 acres of expansion capacity reserved for future use.

We are excited to be considered and look forward to working with your team.

Sincerely,

**Phil Anderson**  
*Chief Investment Officer*  
ROC Seniors Housing Fund Manager, LLC  
1000 Legion Place, Suite 1600  
Orlando, FL 32801

  
**Kent C. Larson**  
*EVP/Director of Development*  
LCS Development  
400 Locust Street, Suite 820  
Des Moines, IA 50309-2334



“Team”

## TEAM INFORMATION

### City of Winter Park

#### ◦ ROC Seniors Housing Fund Manager

Owner

- Phillip Anderson
  - Chief Investment Officer
- Robb Chapin
  - Chief Executive Officer
- Blake Peeper
  - Managing Director

#### ◦ LCS Development

Developer / Manager / Co-Owner

- Kent C. Larson
  - EVP / Director of Development
- Lee Lyle
  - VP / Director of Project Development

#### ◦ Helman Hurley Charvat Peacock / Architects

Architecture

- Michael K. Chatham, LEED AP
  - President / Director of Design
- John M. Purdy, Sr., AIA
  - Vice President, Senior Designer

#### ◦ LAMM & Company Partners

General Contractor

- David Lamm
  - Chairman & CEO
- Bill Poston, PE
  - President



## ABOUT ROC

ROC|Seniors Housing & Medical Properties Fund LP (the "Fund" or "ROC|Seniors") is a private investment vehicle managed by ROC Seniors Housing Fund Manager, LLC ("ROC") which invests in healthcare real estate located throughout the United States, with a primary focus on independent living, assisted living and memory care facilities (collectively, "Seniors Housing").

## \$5.5 BILLION EXPERIENCE, 300 PROPERTIES

ROC|Seniors is managed by a team of eight professionals including Dean Allara, Phillip Anderson, Robb Chapin, Donaldson Hartman, Robert Morse, Rick Steinberger, Jonathan Slager, David Wagle and Blake Peeper. Messrs. Anderson, Chapin, Steinberger, and Peeper have collectively, in previous ventures, purchased, developed or managed approximately 300 seniors housing projects and medical properties with a combined enterprise value of approximately \$5.5 billion.

### MARISTONE OF FRANKLIN

Nashville, TN  
53 AL/MC Units



### RIVER POINT OF KERRVILLE

Kerrville, TX  
53 AL/MC Units



### TOWN VILLAGE NORTH DALLAS

Dallas, TX  
269 IL/AL Units



## 300+ PROPERTIES ACROSS THE U.S.

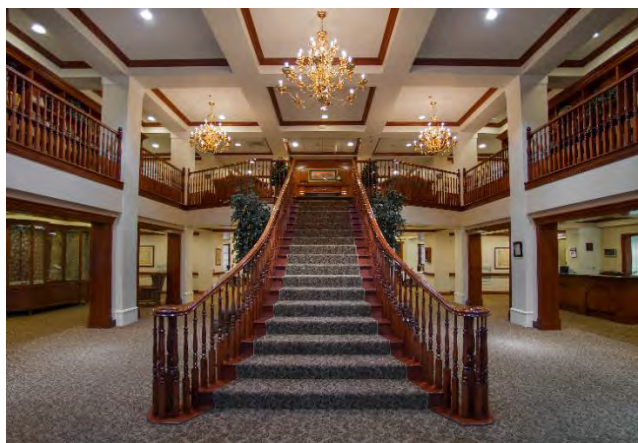




Roc Seniors Housing representative project:

Courtyard at Jamestown, Provo, UT.

Best in class asset with 104 AL/28MC units.





## Maristone of Franklin and Mariston of Providence

Nashville, TN



## Town Village North Dallas

Dallas, TX



## River Point

Kerrville, TX





## Phillip Anderson

General Partner / Chief Investment Officer

### Education:

Bachelor of Science with honors in Civil Engineering from the Georgia Institute of Technology.

### Profile:

Phillip Anderson is a member of the Investment Committee of the General Partner and serves as Chief Investment Officer for the Investment Manager and is a member of its Executive Committee and Asset Management Group. He has more than 28 years of leadership experience in healthcare real estate. Prior to the formation of ROC Seniors, Mr. Anderson co-headed capital markets for the national Seniors Housing efforts of Cushman and Wakefield, Inc. (previously Sonnenblick-Goldman) from May 2011 to October 2013. Over a two year period in this role, Mr. Anderson's team arranged more than \$200 million of general partner equity, limited partner equity and senior debt for Seniors Housing investments. In addition, his team led over \$800 million of investment sales and advisory engagements in the Seniors Housing sector. In 2006, Mr. Anderson founded The Genova Company to pursue personal investments and advisory services, which he continues to pursue today. His experience with The Genova Company includes a \$100 billion global bank on Seniors Housing investments in the United States. From 1999 to 2006, Mr. Anderson served as Chief Operating Officer and Executive Vice President of CNL Retirement Properties, Inc. ("CNL Retirement Properties"), a public, non-listed REIT focused on Seniors Housing properties and medical facilities, which was sold in 2006. During that period, Mr. Anderson oversaw all Seniors Housing acquisitions and the asset management of over 280 Seniors Housing and medical properties. Prior to joining CNL Retirement Properties, Mr. Anderson worked with the Hyatt Corporation from 1985 to 1998, during which time he served as senior vice president of development and a member of the executive team that created Classic Residence by Hyatt, Hyatt Hotel's Seniors Housing affiliate, and oversaw the development and acquisition of upscale Seniors Housing facilities, including over \$300 million of new development. Mr. Anderson has been a member of the American Seniors Housing Association since 1994. In addition, he has served as a member of the board of directors of the National Investment Center for Seniors Housing and Care Industries and as a board member to Westminster Retirement Communities, a not-for-profit manager of continuing care retirement communities. Mr. Anderson also served as an elected City Commissioner for the City of Winter Park, Florida from February 2008 to February 2011.







## Robb Chapin

General Partner / CEO

### Education:

Bachelor of Science in business management from Appalachian State University and is currently a Master of Business Administration candidate at the Crummer Graduate School of Business at Rollins College.

### Profile:

Robb Chapin, is a member of the Investment Committee of the General Partner and serves as the Chief Executive Officer of the Investment Manager and a member of its Executive Committee and Executive Administration Group. In 2012, he co-founded Servant Capital Group, a privately held commercial real estate fund manager that specialized in the acquisition of healthcare properties. From 2005 to 2012, Mr. Chapin served as Co-Chief Executive Officer for Servant Investments and Co-Founder of Servant Healthcare Investments, LLC ("Servant Healthcare Investments"), an affiliate of Servant Capital Group, where he was responsible for corporate strategy, capital formation and served on the executive committee. Servant Healthcare Investments was the subadvisor to a public non-traded healthcare REIT focused on seniors housing and other healthcare related properties and the general partner/sponsor of a private healthcare development fund. From 1999 to 2005, Mr. Chapin served as Executive Vice President for Truststreet Properties, Inc., a publically traded REIT and CNL Financial Group, Inc., a company that held over 2,000 properties in over 40 states. For Truststreet Properties, Inc., Mr. Chapin managed the investment strategy for the acquisition of single-tenant net leased properties and was responsible for over \$2 billion of commercial real estate acquisitions and investments. From 1997 to 1998, Mr. Chapin participated in the formation of CNL Retirement Properties, which acquired a portfolio consisting of over 275 properties nationwide and was valued at over \$4.2 billion. Prior to joining CNL Retirement Properties in 1997, he was the President of Leader Enterprises, a premier sports marketing company.





## Blake Peeper

Managing Director

### Education:

Bachelor of Science in business from Furman University and his Master of Business Administration with a concentration in finance from the Crummer Graduate School of Business at Rollins College

### Profile:

Blake Peeper serves as Managing Director of Acquisitions for the Investment Manager and is a member of its Asset Management Group. Mr. Peeper has been involved in closing over \$1 billion in real estate transactions over the past ten years. Since 2012, Mr. Peeper has served as Senior Vice President of Investments for Servant Capital Group where he is responsible for the firm's investment activities, which includes origination, structuring, underwriting and financing of properties, and plays an integral role in investment strategy and portfolio optimization. From 2011 until joining Servant Capital Group in 2012, he was employed by CNL Financial Group, Inc. ("CNL Financial Group") as an acquisition consultant for two affiliated REITs, CNL Lifestyle Properties, Inc. ("CNL Lifestyle Properties") and CNL Healthcare Trust, Inc. and was involved in the acquisition of over \$200 million of Seniors Housing properties across the United States. From 2007 to 2011, Mr. Peeper was Vice President of Investments for New Broad Street Companies where he led originations, underwriting and structuring of mixed-use development projects for the company. From 2006 to 2007, he was the Senior Director of Development for Marriott Vacation Club International where he originated, structured and underwrote land acquisitions and development opportunities for Marriott Vacation Club International and Ritz Carlton Club vacation ownership projects. From 2005 to 2006, he served as the Manager of Investments of CNL Lifestyle Properties, and from 2004 to 2005, in his first role at CNL Financial Group, he helped create and grow CNL Lifestyle Properties, a REIT with over \$3 billion in portfolio properties.





***The Villa at Suffield Meadows AL/MC***  
***Warrenton, Virginia***  
**56 AL Units/12 MC Units**

***About LCS***

*LCS is a leading provider of high-quality senior lifestyle products and services. Established in 1971, the LCS Family of Companies provide full-service senior living management, development, group purchasing, and home health for continuing care retirement communities (CCRC), and stand-alone rental assisted living and memory care communities. LCS is a national company that currently manages 112 communities, 16 home health offices, 250+ supplier contracts, and employs 550 people.*

***LCS Development***

*LCS Development has been designing and developing senior living communities since 1971, and we draw from this extensive background in every community we serve.*

*As one of the LCS Family of Companies, we have an in-depth understanding of the senior living experience—and unlimited access to in-house resources that other developers must out-source. We specialize in strategic and master planning and project management for both new and existing senior living communities. We bring decades of financial expertise to every project, making the decision to partner with us a low-risk solution for your community.*

*The LCS Development in-house architects, designers and project managers oversee every detail, coordinating efforts with your local team and vendors to ensure the end project meets your budget and your expectations.*





## Project Profiles



**The Heritage at Brentwood, Brentwood, Tennessee (CCRC)**



**Sagewood, Phoenix, Arizona (CCRC)**



**Timber Ridge at Talus, Issaquah, Washington (CCRC)**



## HHCP FIRM OVERVIEW

Helman Hurley Charvat Peacock/Architects, Inc. (HHCP) is one of the most established architectural design firms in Central Florida. Founded in 1975, HHCP employs more than 50 architects, planners, and technical staff that are further supported by carefully selected consulting engineers, interior designers and other specialists with whom we have had long successful relationships. HHCP has grown and evolved into an international firm providing comprehensive planning and architectural services nationwide and in over 30 countries around the globe, from our headquarters located in downtown Orlando, Florida and an international office in Shanghai, China.

For more than 35 years, HHCP has collaborated with a varied base of clients to positively enhance the architectural landscape of the regions we serve. Within the Central Florida community, HHCP Architects has completed major projects for Buckner Retirement Services, Sunbelt Health Care Center, Department of Veterans Affairs, Forum Group, Life Care Services, LifeSpace Communities, Florida Hospital, Orlando Health, Health Management Associates, City of Orlando, Orange County Government, Rosen Hotels International, University of Central Florida, the Orlando Science Center, Sea World, Walt Disney World and many other clients.

The diverse practice areas of HHCP include:

- + Healthcare and Research Facilities
- + Senior Care & Assisted Living
- + Hotels & Resorts
- + Themed Entertainment
- + Planning, Mixed Use & Residential
- + Government & Civic
- + Higher Education
- + Construction Analysis, Support and Evaluation (CASE)

The planning and design of healthcare, research and

senior care/assisted living facilities are among HHCP's largest practice areas. These highly specialized markets are led by HHCP Healthcare; the firm's largest operating division, which has a staff of professionals solely dedicated to healthcare and related projects. The range of our projects span the entire continuum of services and include master planning, detailed designs for expansions and renovations to existing facilities and new or replacement facilities for a broad range of private and public clients. HHCP Healthcare has completed hundreds of projects throughout Florida, 16 other states, and Puerto Rico having a total construction value of more than \$3 Billion.

Together, we go beyond the status quo in providing services to, and meeting the expectations of, our clients. We are committed to thoroughly listening, exploring and understanding the unique needs of every client and project. HHCP forms collaborative teams within an integrated design process that fosters innovative and creative strategies and solutions that are also timely, fiscally appropriate and maximize our client's return on investment – at every level. The benefit: buildings that meet their intended purpose and use; a highly satisfied base of continuing clients; and a reputation as champions of our client's vision and translating their goals into reality.





## EXPERTISE

### Senior Living Facilities Design

The quality reputation and recognition HHCP has earned as a leading design and planning firm for Senior Living Facilities is an accomplishment of great pride for our firm. Understanding the special needs of aging residents within Independent Living Units (ILU), Adult Congregate Living Facilities (ACLF), and Skilled Nursing Facilities (SNF) is a unique, specialized, and rewarding design service of HHCP. Creating an adaptive, supportive, comfortable and satisfying home that people in their golden years can enjoy within a community environment that stimulates and motivates a positive and rewarding lifestyle is the goal of every retirement community we design. America is a leader in the study and creation of quality retirement communities and the most prominent developers have turned to HHCP for their leadership of planning and insight of design.

### Hotel & Resort Design

Designing for the best guest experience has always been the focus of our Resort and Hotel Design process. Whether the project is an exclusive boutique hotel, urban convention hotel, prominent golf resort, or an exotic timeshare resort, our designers understand the critical differences of design, function, and finance and market position. Our global experience in evaluating the target market and designing a distinctive product for each new opportunity has often allowed our clients a competitive edge for success and longevity. We pride ourselves in understanding of back-of-house operations that facilitate a functional design efficient in both area allocation and staffing. Numerous domestic and international awards from the American Resort Development Association are a clear recognition of our design success, yet the most important recognition is our clients' success and millions of happy guests, who enjoy an HHCP-designed guest experience.

### Health Facilities Design

Our knowledge of healthcare facility design comes from over 30 years of client interaction, continuing education, testing of new design applications and understanding the changing nature of healthcare delivery and facilities. We strive for flexibility in the design, as well as functional enhancement, aesthetic quality and economic viability of our healthcare facilities.

HHCP Healthcare consists of 20 designers, planners, managers, project coordinators and support staff who have dedicated their careers to the design of healthcare facilities. Their hands-on knowledge of multiple healthcare project types range from replacement hospitals to additions/renovations for women's and infants centers, imaging centers, outpatient surgical centers, emergency departments and medical office buildings.

Licensed in 17 states and Puerto Rico, HHCP Healthcare has completed more than 450 healthcare projects totaling more than \$3 billion. We believe this depth of experience and knowledge brings the latest trends in healthcare planning, technology, and communication ideas to our clients.

### Residential Community Design

Having designed some of the most prominent and prestigious residential resort communities around the world, HHCP focuses on creating a lifestyle that will appeal to each project target market. The amenities of the community, convenience of service, and sensitive relationship to natural features are a critical part of the planning and design of the lifestyle. The architecture in terms of image, function, and cultural criteria are a vital focus in profiling the target market. HHCP realizes that the decision of ones home and the community where they can live, work, and play is one of the most rewarding design opportunities for planning growth and influencing cross cultural quality of life.



## Profile

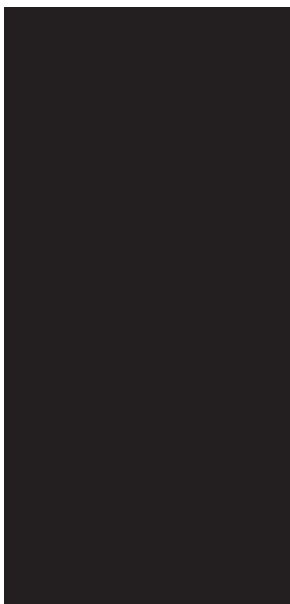
Lakeview Terrace Retirement Community is an existing continuing care retirement complex located on a scenic hilly site in Altoona, Florida. To address the community's growth and long term goals, HHCP prepared a multi-phase master plan for the 100 acre site, designed around two existing recreational lakes. Phase one of the development includes a new 40,000 SF community clubhouse overlooking the lake with a banquet hall and two private dining rooms providing seating for approximately 120 persons and an exterior terrace for up to 50 residents. Also included in the clubhouse is and a new 3,300 SF full service kitchen and buffet area, a 40 seat bar and grille, a pre-function lounge with reception lobby and 9,445 SF of shell space for future build out and a 368 seat auditorium with stage facilities for community meetings, and entertainment events. Linked to the clubhouse will be a new 39,000 SF, four story, Independent Living Tower, with a 10,000 SF basement parking level for resident autos and golf carts. The 24 living units in the tower are a mix of one and two bedroom options, each with private balconies.

The Skilled Nursing Facility is a 56,000 SF, four-cluster complex of 16 beds each with a central service core for residents requiring skilled nursing care, dementia care and assisted living convenience. The common area in each cluster includes a resident activity center, fireplace and open and private dining accommodations. The central focal point of each cluster's common area is a full height, custom sculptured, artificial tree, with a surrounding Koi fish pool providing a naturalistic setting for the resident living area. Phase 1 also includes two 5,000 SF, four-plex Villas staggered along a sloping hillside overlooking the lake. Each Villa will include a mix of 1 and 2 bedroom apartments with private balconies and covered parking for autos and golf carts.

The existing complex includes 37 detached Garden Homes sprinkled throughout the winding roads of the site as well as a 3-story and a 5-story apartment building. The exterior of all existing residential buildings are being upgraded with architectural features, materials and colors to be compatible with the new architectural image of Phase 1.







## Profile

HHCP has been the Architect for multiple new and renovation projects for Village on the Green since the retirement facility was originally designed in 1984. HHCP's most recent project was the 26,000 SF Health Center Renovations and Systems Upgrade which was completed in January 2012. The complex includes a Community Center, a 30 bed Skilled Nursing Facility including assisted living, 13 four Plex Garden Homes and 6 five-story Apartment Towers. In today's dollars it is a \$35,000,000 campus of approximately 280,000 SF.

Developed on 29 acres bordering on five holes of Sabal Point Golf Course, this Continuing Care Retirement Community offers a country club lifestyle to its retired residents. Village on the Green is in the heart of it all, but once inside our front gate you would never even know it. Here you feel like you're in a wonderful, secluded world. That's because the Golf Club is surrounded by 3,000 wooded acres - 2,000 of which are a wildlife preserve. The Clubhouse provides for relaxed dining and a full range of social and recreational amenities.

Residential units at Village on the Green include one, two and three bedroom apartments contained in three-story, 36 unit buildings as well as two bedroom villas. Apartment communities are linked to the Clubhouse with covered walkways to provide protection from Florida's sun and predictable afternoon summer showers.



## Profile

The Miller Center was designed to serve two separate, but related functions. A portion of the structure was designed to accommodate an Adult Day Care Center licensed for forty participants, most of whom are Alzheimer patients. In addition to divisible specialized activities spaces for each group, a variety of services spaces have been provided, including a clinic, hair salon, personal grooming, and laundry areas. A large, screened porch opens onto a controlled outdoor program area designed for both active and passive activities.

Special attention was devoted to preserving a number of large trees on site and the plan configuration was developed to maintain these valuable natural assets. These large trees provide a shade canopy at both entrances and in the outdoor activities area. The character of the building is intentionally residential; partly to fit the neighborhood, but primarily to provide a sense of familiarity to the many cognitively impaired individuals who come to the facility daily. We wanted them to feel like they were visiting someone's home, rather than going to an institution.

The entrance from the parking area is via a beautifully landscaped trellis patio and provides access to the Operations center for the overall facility. A Resource Center is available for the residents seeking information including assistance with on-line research. Offices are equipped with Life Line, an emergency alert service, and the local chapter of the Alzheimer Association.





## Profile

The planning of full-service retirement communities involves a number of challenges. Chief among these is the need to create a series of accommodations which are tailored to the varied needs of residents while maintaining some visual separations between the levels of care. Nestled in a serene woodland setting – Calder Woods combines an array of amenities and activities to enhance the physical, mental and spiritual well-being of every resident, in all seasons of life. Calder Woods features 94 independent living apartments, a 30-unit assisted living facility, a 16 bed certified memory care support unit, a 30-bed state-of-the-art skilled care center, spacious apartment homes, and a 19,000 square foot clubhouse.



## Profile

The skilled nursing facility is composed of two 60-bed “villages”, each containing three 20-bed “neighborhoods”. Neighborhoods are clustered around a village center containing all of the nursing support areas. The typical neighborhood includes both private and semi-private resident rooms. Private rooms have direct access to outdoor patios via glass doors. The semiprivate rooms are designed to avoid the typical problems that frequently arise regarding privacy and loss of control over personal space by featuring clearly identifiable zones for each resident. The rooms are arranged into small groups and situated around an open foyer providing privacy and a homelike atmosphere. A separate dining room and central kitchen area is provided for each of the two villages contributing to the welcoming community feeling.

In order to maintain the homelike feeling, special attention was paid to the design of daily caregivers needs by creating unique ways to camouflage equipment. Closable fireplace-like niches conceal wheelchairs and other items and 8-foot catwalks above utility rooms provide access to HVAC equipment allowing maintenance personnel to conduct routine repairs unbeknownst to residents. The design objective was to create a supportive, homelike and non-institutional environment.





## Profile

Skilled nursing care is the core of the Alliance Community's services, which also includes rehabilitation care, sub-acute care with its own 20-bed unit, and a Dementia/Alzheimer's care specialty unit. HHCP worked closely with the Owners, as well as the City of Deland and Volusia County representatives to provide a Development Master Plan in addition to providing full A/E services for the expansion of the original Nursing Center and a new Health Services Facility.

Designed in the Florida vernacular, the architecture complements the character of the surrounding neighborhood, while at the same time offering a budget-conscious approach to retrofitting some of the existing buildings so that they could become visually integrated with the new structures.

The existing nursing center was remodeled to provide assisted living accommodations for 24 individuals in 8 private and 8 semi-private rooms. The new 69,000 sf three-story Health Services Building included 32 assisted living rooms along with necessary support spaces on the ground floor. The 2nd and 3rd floors each contain a skilled nursing unit, providing a total of 130 (80 new and 50 renovated) skilled beds. Separate circulation elements segregate assisted from skilled residents.

Currently HHCP is designing a "Small House" concept Assisted Living Building on the Alliance Community Campus. The building will be constructed in 2 phases. The first phase includes 14 residential units with a common great room living area, dining room, kitchen, media room, and support facilities. The second phase will include 10 additional living units and a second living/dining area. All 24 units will share a common entrance, but operate as two small homes. If successful, additional small houses will be added to the campus based on demand.



## Profile

Designed with in a country club setting, Aston Gardens at Sun City Center contains ten buildings housing 264 one and two bedroom independent living apartment homes.

The community offers quaint lakeside gazebos, a koi pond, golf course, a citrus grove and park, along with many other amenities. The Bermuda style architecture provides a welcoming atmosphere for Residents. Exceptionally spacious floor plans, a country club setting featuring golf course vistas make Aston Gardens at Sun City Center an innovative option in independent senior living. It proudly features an elegantly appointed 20,372 SF clubhouse that contains a bank, library, game room, Grande Ballroom, comfortable lounge, luxurious dining rooms, a cozy fireplace, fitness center, an arts studio, a beauty and barber salon.





## Profile

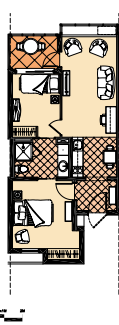
A common international reference for life in retirement is someone living in their “golden years”. These special years following one’s working life when achievements are complete, time for enjoyment is more abundant, and friends, family, especially grandchildren, are a special focus; are precious years which can be even more rewarding when your home and community are designed to best support a quality retirement life style. This is the Golden Years Goal targeted by Mr. Hu Yufang’s China Retirement Club communities designed by the aging community experts at HHCP Design International in Orlando, Florida USA, and this will be a “life worth waiting for!”

The China Retirement Club community in Kunshan is developed as a lake side harbor town unique in its atmosphere and life style from other retirement destinations. The master plan is organized around a central harbor town village and marina with convenient access for all residents. The village is the social activity center providing all indoor amenities and services for the community. The other primary activity zone is the outdoor sports recreation park positioned along the primary lake edge providing tennis, swimming, badminton, lawn sports, relaxation pavilions and gardens for enjoying nature, fresh air and the expansive lake view.



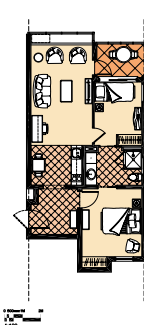
2 BEDROOM UNIT - TYPE B

SCALE 1/100 DATE: 12-14-06  
Unit Area = 61 sm  
Balcony = 5.3 sm  
Total Area = 66.3 sm



2 BEDROOM UNIT - TYPE B2

SCALE 1/100 DATE: 12-14-06  
Unit Area = 62 sm  
Balcony = 5.3 sm  
Total Area = 67.3 sm



2 BEDROOM UNIT - TYPE B3

SCALE 1/100 DATE: 12-14-06  
Unit Area = 67 sm  
Balcony = 5.3 sm  
Total Area = 72.3 sm





**President  
Design Director**

MChatham@HHCP.com

**Profile**

As Design Director, Mike is responsible to the client and the design team for design concepts, development of the overall project design and project design standards. Mike has over 27 years of design and project documentation experience in a wide variety of project types. His enthusiasm and experience qualify him to undertake a variety of demanding design challenges. He continuously exhibits the ability to quickly understand the functional, programmatic, and budgetary requirements of the client, and to sensitively resolve these issues through the creative design and illustration of their projects. He has a strong record of bringing creative solutions to technically complex planning and design projects.

**Selected Projects**

- Lakeview Terrace Retirement Community, Altoona FL
- The Alliance Community, Deland, FL
- Village on the Green, Longwood, FL
- UCF Continuing Care Retirement Community Master Plan, Orlando, FL
- Christian Village Retirement Resort Community, Tavares, FL
- Ladies of the Grand Army of the Republic Home, Pittsburgh, PA
- Bay Harbour Club, Continuing Care Retirement Community, Sarasota, FL
- WDW Polynesian Resort Rehab, Lake Buena Vista, FL
- WDI Golden Oak Clubhouse, Lake Buena Vista, FL
- Jekyll Island Convention Center & Beach Village, Jekyll Island, GA
- Rosen Shingle Creek Resort, Orlando, FL
- Embassy Suites Hotel, Lake Buena Vista, FL
- Fairmont Orlando at Grand Cypress, Orlando, FL
- Wyndham Grand Orlando Resort at Bonnet Creek, Orlando, FL
- Wyndham Vacation Resort at Bonnet Creek, Orlando, FL
- Marriott's Grande Vista Resort & Golf Academy, Orlando, FL
- Gateway Hilton Hotel, Kissimmee, FL
- Caribe Village Timeshare Resort, Orlando, FL
- Caribe Royale Resort Convention Center Expansion, Orlando, FL
- Vistana Resort Interval Ownership Resort, Hutchinson Island, FL
- Comfort Suites Hotel, Kissimmee, FL
- Palm Sales Centre, Dubai, UAE
- Trump Plaza (Village Centre), Palm Jumeirah, Dubai, UAE

**Education**

- University of Florida, Gainesville, FL  
*Bachelor of Design*  
*Master of Architecture*

**Qualifications & Affiliations**

- American Institute of Architects (AIA)
- Registered Architect: AL, AR, FL, GA, KY, LA, MS, MO, NV, PA, PR, SC, TX, WA, WV
- NCARB Certified
- USGBC LEED Accredited Professional
- University of Florida, College of Architecture Liaison Committee

**Awards**

- The Palm Sales Centre, Dubai, UAE  
*2004 ARDA Gold Award - Sales Centers*
- Lynx Central Station, Orlando, FL  
*2004 Award of Excellence - Downtown Orlando Partnership*  
*2004 Excellence in Construction / Eagle Award - Associated Builders and Contractors, Inc.*
- Marriott Grande Vista Resort & Golf Academy, Orlando, FL  
*1998 ARDA Silver Award - Resort Design*  
*1994 ARDA Silver Award - Land Utilization*
- University of Florida Young Designer for 2002



**Vice President  
Design Director**

[jpurdy@HHCP.com](mailto:jpurdy@HHCP.com)

**Profile**

John is an award winning Senior Design Architect with over 45 years of design experience both nationally and internationally. He brings exciting solutions to design issues while always integrating the Client into the process. He continuously exhibits the ability to bring creative solutions to technically complex planning and design projects. John is a diverse architectural designer with experience in hospitality, leisure, education, civic, retirement and health care facilities.

**Selected Projects**

- Lakeview Terrace Assisted and Independent Living Community, Altoona, FL
- Lakeview Terrace Dementia Facilities, Altoona, FL
- Lakeview Terrace Skilled Nursing Cluster Homes Concept, Altoona, FL
- UCF Continuing Care Retirement Community Land Use Analysis, Orlando, FL
- The Vineyard Care Retirement Community Land Use Analysis, Windermere, FL
- Red Maple Retirement Community, Kunshan, China
- 250-Unit Assisted Living Community, Sunrise, FL
- 300-Unit Retirement Community, Palm Beach, FL
- 360-Unit Congregate Living Facility, Altamonte Springs, FL
- Alliance Community for Retirement Living, DeLand, FL
- Alzheimer Care Center, Orlando, FL
- Aston Gardens, 240 Units, Parkland, FL
- Aston Gardens, 264 Units, Sun City Center, FL
- Aston Gardens, 276 Units, Pelican Marsh, FL
- Bentley Village, 180 Units of Independent Living, Naples, FL
- Bentley Village, 48 Assisted Living and Dementia Facility, Naples, FL
- Brethren Home, New Oxford, PA
- Buckner Retirement Community, Beaumont, TX
- Calder Woods, Beaumont, TX
- Continuing Care Retirement Community, Pompano Beach, FL
- Fairhaven Retirement Center, Upper Sandusky, OH

**Education**

- University of Illinois, Urbana, Illinois  
*Bachelor of Architecture (with Honors)*
- Crozier Theological Seminary  
*University of Chicago Divinity School*

**Member of**

- American Institute of Architects
- Registered Architect: PA
- NCARB Certified

**Awards**

- Sunbelt Living Center, Apopka, FL  
*1994 Outstanding Project Award Hospital, Health Care Facilities \$3-\$10 Million, The Central Florida Chapter of Associated Builders and Contractors, Inc.*
- Emerald Grande at HarborWalk Village, Destin, FL  
*2008 ARDA Gold Award - Interior Design - Common Area*
- Marriott Grande Vista Resort & Golf Academy, Orlando, FL  
*1998 ARDA Silver Award - Resort Design*  
*1994 ARDA Silver Award - Land Utilization*
- The Palm Trump International Hotel and Tower, Dubai, UAE  
*2006 ARDA Silver Award - Resort Architecture*
- The Palm Master Plan, Dubai, UAE  
*2005 ARDA Gold Award - Site Utilization*  
*2004 ARDA Gold Award - Resort Architecture*



*Construction  
Managers*

*General  
Contractors*

*Design/Build*

*Development  
Managers*

## CORPORATE HISTORY

Lamm & Company Partners is a well-established Construction Manager and Design/Builder for select manufacturing, commercial, and interiors projects; specializing in income producing and investment grade properties for owner-users, investors and institutions. Lamm & Company Partners is comprised of the Building Group, Interiors Group, and the Development Group.

Since its inception in 1991, Lamm & Company Partners has established an excellent client base and a broad range of successful project experience. We develop long-term relationships to provide better, smarter and faster delivery of investment opportunities; proving us to be a partnership that delivers on-time, on-budget projects.

Lamm & Company Partners has been able to maintain a continued growth rate because of its dedication to customer satisfaction, prompt performance, high standards of workmanship and attention to the myriad of details necessary to bring all projects to successful completion.

The most outstanding attribute of Lamm & Company Partners is that we continually demonstrate our philosophy of client satisfaction. This is evident by the high percentage of repeat and negotiated work we have with investors, owner-users, and institutions; a few of which include:

- Full Sail University
- Taurus Development
- Florida Bank of Commerce
- Florida Hospital
- Rollins College
- Fields Group
- TrustCo Bank
- Avalon Park Group, Inc.
- College Park Business Center
- Orlando Heart Center
- Dyer, Riddle, Mills & Precourt, Inc.
- Workforce of Central Florida



**LAMM**  
COMPANY  
PARTNERS





Development  
Managers

Construction  
Managers

General  
Contractors

Design/Build

## **Park Tower at Avalon (Encore) • Healthcare Facility**

ORLANDO, FLORIDA

- OWNER: AVALON SENIOR LIVING, LLC
- ARCHITECT: BAKER BARRIOS ARCHITECTS
- CONTRACT AMOUNT: \$10,105,000
- SQUARE FOOTAGE: 80,000 SF
- DESCRIPTION: NEW CONSTRUCTION

MULTIPURPOSE PERFORMANCE VENUE

**LAMM**  
COMPANY  
PARTNERS

“Progress Point Property Project Profile”

## PROGRESS POINT PROPERTY PROJECT PROFILE

### Providing Residents with World-Class Living

Drawing on the combined experience from some of the country's most experienced owners and operators of seniors housing, we have envisioned a community that serves assisted living and memory care residents with grace and understanding.

### Gateway Greenspace

- Open Courtyard framing the community and cooling the streetscape
- Corner Park connecting this central pedestrian intersection
- Pedestrian scale

### Community Commons

- Approximately 15,000 square feet
- Intergenerational Bistro and Coffee Bar open to the public
- First class dining facilities for Residents
- Resident activity and gaming areas, indoor and outdoor
- Administrative and support offices
- Marketing and sales offices
- Wellness Center for therapy and medical advice and assistance

### Assisted Living

- 80 unit upscale facility offering personal and directed licensed care
- Ample one bedroom, 2 bedroom and Alcove residences
- While Residents enjoy 3 meals a day in the Commons, kitchenettes are provided in apartments

### Memory Care

- 32 units
- Primarily studio apartments
- Customized programs to promote independence and harmony

### Ample Parking

- 80 Spaces
- Primarily accommodating staff

### Expansion/Commercial Use

- 0.5 Acres reserved for future uses



- ① Commons/ B.O.H.  
1 Story - 12,814 sf
- ② Assisted Living  
80 Apartments  
3 Story - 58,759 sf
- ③ Memory Care  
32 Units  
1 Story - 15,412 sf
- ④ Future Expansion

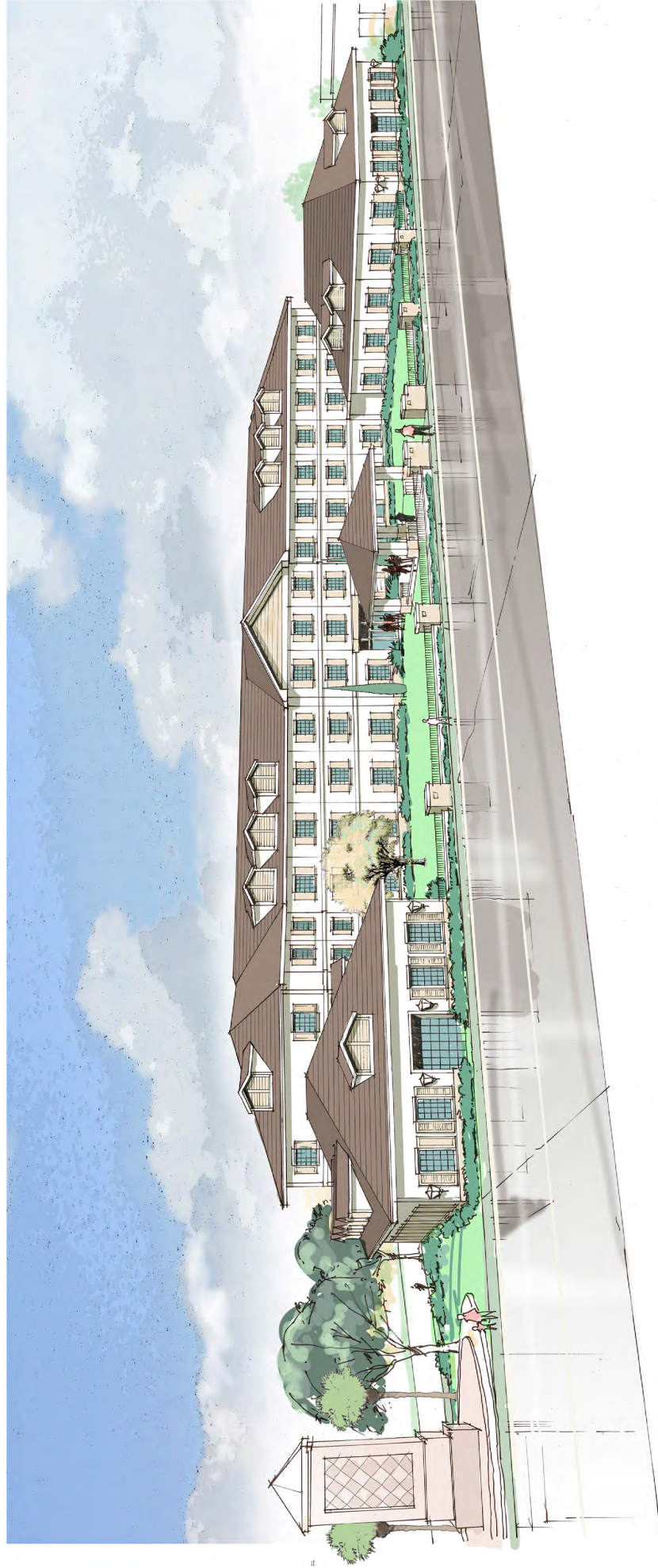


Conceptual Elevation



View from Orange Avenue

## Conceptual Elevation Massing Study



View from Orange Avenue



## Conceptual Elevation Massing Study



View from Orange Avenue

CONTACT

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Chief Investment Officer

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Senior Vice President of Investments

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M : (407) 415-2888

Ken C. Larson

EVP / Director of Development

LCS DEVELOPMENT

400 Locust Street, Suite 820

Des Moines, IA 50309

P : (515) 875-4604

M : (515) 991-1053

# Economic Development Advisory Board



meeting date 6-16-15

approved by

item type ☐ Administrative  
☒ Action  
☐ Information

☐ City Manager  
☐ City Attorney  
☐ N/A

**agenda  
item**

## Subject 2b

Staff is requesting input regarding the use of a commercial broker to represent the sale of city-owned properties.

## **motion | recommendation**

Recommendation of essential functions for a city contracted commercial broker is requested.

## Background

At the June 8, 2015 City Commission meeting, the Commission inquired regarding the possibility of using a broker for the sale of city-owned properties. The Commission has asked for feedback from EDAB on this matter.

There are two types of agreements which may be useful to the city. The first is a general services agreement in which the broker markets properties, fields potential buyers, facilitates negotiations and closings. Generally compensation is determined by a percentage of sale or commission. The second type of agreement is a fee for service agreement. This type of agreement can be used for special roles such as advising staff in determining highest and best use, assisting in city efforts, long range planning, and evaluating and sharing recent trends in the real estate market. These individuals or firms are generally paid by the hour. It is also possible to create an agreement which balances the two. It is also important to note that in either case the agent is familiar with government real estate practices and law.

Attached is an example of each scope of services currently in use from a city and county in the Central Florida area regarding broker professional services.



**PROFESSIONAL SERVICES AGREEMENT  
REAL ESTATE SERVICES WITH  
THE TRIECE COMPANY**

This Agreement is made and entered into this 11<sup>th</sup> day of May, 2011, by and between the **CITY OF EDGEWATER, FLORIDA**, a municipal corporation (hereinafter referred to as "CITY"), 104 North Riverside Drive, P. O. Box 100, Edgewater, Florida 32132-0100 and **THE TRIEVE COMPANY** (hereinafter referred to as "REAL ESTATE BROKER"), Suite 4, Bank America Bldg., 150 S. C.R. Beall Blvd, P.O. Box 530598, Debarry, Florida 32753-0598.

**PREMISES**

**WHEREAS**, the City wishes to employ a Real Estate Broker to assist the City relating to various real estate projects/assignments, and,

**WHEREAS**, the City desires to employ the Real Estate Broker in connection therewith upon terms and conditions hereinafter as set forth, and the Real Estate Broker is desirous of obtaining such employment and has represented that it is qualified and competent to perform such services, and,

**WHEREAS**, in March 2011, the City advertised for "Requests for Qualifications" from qualified real estate firms; and

**WHEREAS**, during the City Council meeting on May 16, 2011, Council authorized selection of two (2) real estate firms.

**NOW, THEREFORE**, in consideration of the premises and mutual covenants hereinafter set forth, City and Real Estate Broker agree as follows:

**1. SCOPE OF PROFESSIONAL SERVICES**

The Real Estate Broker agrees that it shall diligently and timely perform professional services as requested by the City. Real Estate Broker understands that the City may request these professional services on an as-needed basis and that the requested services may require the following:

- Negotiate the purchase/sale/lease of all parcels assigned to the Contractor by the City. Obtain executed purchase agreements in accordance to the form and content as directed by the City.
- Advise the City, and its staff in matters regarding the purchase, offers, claims, counteroffers, discussions, and issues pertaining to the purchase/sale/lease of the assigned property(ies).
- Attend closings scheduled on purchases/sales by the City, at the request of the City.
- Attend meetings and/or public hearings with City staff, their agents, City officials, property owners, and other parties involved in the project, at either the request of the City or as part of the Contractor's work effort.

- Assist the City with efforts of obtaining plans, right-of-way maps, title searches, title commitments, owner's title policies, appraisals, acquisition and/or eminent domain use in a project.
- Provide other real property services requested by the City to plan, implement, negotiate, purchase, sell, lease and acquire the property assigned by the City.
- Maintain professional courtesy in all contacts with property owners.
- Provide the City with the original and/or a copy of all documents produced by the Contractor as a result of the work assigned, if requested.

Upon request for professional services by the City for a specific project, the Real Estate Broker shall provide the City with a Scope of Work and detailed itemization of costs and time required to perform those tasks as outlined in the Scope.

Upon approval by the City, the Scope of Work, costs and time relating to the Project will be specifically set out and incorporated into a Work Order to be issued under and become a part of this Contract. This Contract standing alone does not authorize the performance of any Work or require the City to place any orders for Work. The City reserves the right to contract with other parties for professional services within the scope of this Contract when it is determined to be in the best interests of the City to do so.

The Real Estate Broker or his/her designee, as approved by the City, agrees to perform the functions of their office in a competent and professional manner. The Real Estate Broker shall maintain an adequate and competent staff of professionals and may associate with other qualified firms for the purpose of rendering services hereunder, without cost to the City, and upon approval by the City. The Real Estate Broker, however, shall not sublet, assign, or transfer any Work under this Contract without the written consent of the City.

## **2. TIME FOR COMPLETION**

The services to be rendered by the Real Estate Broker shall be commenced, upon receipt of the Notice to Proceed and Work Order to be issued hereunder, and shall be completed within the time specified therein. In the event the Real Estate Broker is unable to complete the services within the time specified because of delays resulting from untimely review and approval by the City, the City may grant a reasonable extension of time for completion of Work upon timely written request for same which shall be given by Real Estate Broker to the City no later than forty-eight (48) hours after such occurrence.

In the event there are delays on the part of the City or regulatory agencies as to the approval of any work product submitted by the Real Estate Broker, which might delay the project's scheduled completion date, the City shall grant to the Real Estate Broker in writing an extension of the Contract time equal to the aforementioned delays. The City shall be solely responsible for determination of whether any extension of time for performance should be awarded to the Real Estate Broker.

## **3. AUTHORIZATION FOR SERVICES**

Authorization for performance of professional services by the Real Estate Broker shall be in the form of Work Orders issued by the City. Each Work Order shall describe the Project, the services required, and shall establish the method of payment and time frame.

**PROFESSIONAL CONTINUING SERVICES AGREEMENT**

**BETWEEN**

**OSCEOLA COUNTY, FLORIDA**

**AND**

**NVISION DEVELOPMENT MANAGEMENT SERVICES, LLC**

**RFP-12-03081-RJ**

**CONTINUING PROFESSIONAL REAL ESTATE CONSULTING SERVICES**



**ATTACHMENT "A"**  
**PROJECT DESCRIPTION AND SCOPE OF PROFESSIONAL SERVICES**

I. Scope of Services:

The CONSULTANT will provide various professional services relating to real estate consulting services. Such services may include, but is not limited to the following:

A. General Consulting Services:

The CONSULTANT may be tasked with providing their expert opinion, market analysis, guidance regarding Statutory requirements as they may apply to best use of public property along with general consulting services of an unspecified nature that are consistent with real estate industry best practices and in accordance with established local, state and federal guidelines.

B. Leasing Scope of Services

If tasked, the CONSULTANT will act as the County's leasing agent for third party leased space/property, providing services including, but not necessarily limited to, the following:

1. Prepare and implement a marketing plan for the building's available vacant space.
2. Identify, solicit and recommend prospective tenants, through the CONSULTANT'S own efforts and in cooperation with tenant brokers.
3. Verify the background, suitability, financial viability and creditworthiness of prospective tenants.
4. Negotiate lease terms and conditions with prospective tenants.
5. Negotiate renewal terms and conditions with existing tenants.
6. Coordinate lease preparation and execution.
7. Provide regular reports of leasing efforts/status and relevant market conditions.
8. Provide all other services as required in the normal course of business in managing the building's leasing program.

C. Property Management Services:

If tasked, the CONSULTANT'S services may include all aspects of building management and operations. Services may include, but are not limited to, the following:

1. Tenant management, including lease administration/enforcement; tenant communications; rent collection; escalations/operating expense administration; and all related tenant services and issues.
2. Coordination of Tenant build-out, improvements and other capital improvements.
3. Engineering services, including the operation, maintenance, and repair of Heating, Ventilation & Air Conditioning systems; Electrical systems and lighting; Plumbing; Fire/Life Safety systems; Elevators; and all other building systems, equipment, envelope, exterior, grounds, and structural elements.
4. Janitorial/custodial services, including, trash removal; carpet cleaning; window washing;

- pest control, and related services.
5. Procurement of all goods and services required for the management and operation of the leased space and common areas associated with the lease space, using competitive bidding processes for vendor evaluation and selection. Common areas associated with the parking garage will be maintained by the COUNTY. The COUNTY reserves the right negotiate maintenance of common areas adjacent to the lease space but also used by parking garage operations.
  6. Management/administration of contracts with vendors, utility companies, and others as required. (assuming the cost of these utilities are included in the rents collected)
  7. Regulatory/legal compliance, coordination and reporting with city, state and federal agencies, as required.
  8. Compliance with a budget approved by the COUNTY for all goods, services and activities related to building operations and management.
  9. Complete accounting and record keeping for all expenses incurred, income and other revenue received. l) Submission of monthly reports detailing building operation and expenses, maintenance activities; tenant issues; new and/or expiring leases; and other information as required by the COUNTY.
  10. All other services as required in the ordinary course of business in managing and operating the building.

II. Project Assignments:

At such time as the COUNTY has identified the need for specific services to be made, an Osceola County Representative will contact one of the selected CONSULTANTS to determine the specific scope of the project and the compensation to be paid therefore. Assignments will be given at the COUNTY'S sole discretion.

Following selection and negotiation of an acceptable proposal and schedule for services a Purchase Order will be issued. No work is to be performed until the Purchase Order is issued by the COUNTY. The COUNTY may order changes within the specific Purchase Order which are within the general scope of the Agreement. Prices for the specific project, completion dates and delivery dates shall be adjusted accordingly.

Initials of  
Signatories:

 1/31/2013  
CONSULTANT/date

\_\_\_\_\_  
COUNTY/date

# Economic Development Advisory Board



meeting date 6-16-15

approved by

item type ☐ Administrative  
☐ Action  
☒ Information

☐ City Manager  
☐ City Attorney  
☐ N/A

**agenda  
item**

## Subject 3a

Staff is providing an update on the city-wide visioning process.

## **motion | recommendation**

None

## **Background**