

West Bastanchury Site

Yorba Linda, California

Technical Assistance Panel Report
December 11, 2014



Prepared by



Prepared for





Guiding Principle

The final outcome of every ULI TAP is objectivity, transparency and replicability.

ULI Leadership

Randy Jackson
Chair, ULI Orange County/Inland Empire

John Shumway
Vice Chair, Technical Assistance Panels

Phyllis Alzamora
Executive Director, ULI Orange County/Inland Empire
phyllis.alzamora@uli.org
orangecounty.uli.org

TAP Panelists

Pamela Galera, ASLA, LEED-AP, Principal Project Planner, City of Anaheim
Linda Congleton, Principal, L.S. Congleton & Associates
M. Paul Conzelman, Principal/President, SC Development
David Luzuriaga, PE, LEED AP, Associate, BKF Engineers
Todd Pennington, CEO/Founder, Pennington & Company, LLC
Oscar Uranga, Project Manager, Shopoff Realty Investments

Report Writer

Jessica Candaele



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Introduction

Determining the future of undeveloped and city-owned land within the heart of a city is a remarkable opportunity but also a challenging task. The City of Yorba Linda (“City”) has been presented with such an opportunity and challenge. The West Bastanchury Site (“Site”) is comprised of three parcels totaling approximately 40-acres of city-owned land. The City sought guidance from the Urban Land Institute Orange County/Inland Empire District Council (“ULI”) to help them with the process of identifying possible uses for the Site.

ULI conducted a Technical Assistance Panel (“TAP”) on December 11, 2014 for the City. ULI provides public agencies with findings and recommendations that can be used to solve real estate and land issues in a uniquely objective way. A panel of seven experts from the land use industry was formed; biographies are provided at the end of this report. The panel met with city staff, toured the site, conducted due diligence, and presented their findings at a public meeting at the City. Conclusions outlined in the presentation are detailed in this report.

Panelists

- Pamela Galera, ASLA, LEEP-AP, Principal Project Planner, City of Anaheim
- Linda Congleton, Principal, L.S. Congleton & Associates
- M. Paul Conzelman, Principal/President, SC Development
- David Luzuriaga, PE, LEED AP, Associate, BKF Engineers
- Todd Pennington, CEO/Founder, Pennington & Company, LLC
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ULI Leadership

- Randy Jackson, Chair
- John Shumway, Vice Chair, Technical Assistance Panels
- Phyllis Alzamora, Executive Director

ULI Support

- Jessica Candaele, Report Writer

“ULI’s mission is to provide leadership in the responsible use of land and in creating and sustaining thriving communities worldwide.”

Executive Summary

The City of Yorba Linda is seeking guidance on the future development of 40-acres that meets its goals and visions, which are to 1) benefit the general public, 2) fill a need in the community, 3) integrate into the surrounding community, and 4) be financially and operationally funded.

Once ULI was engaged with conducting a TAP, the City provided the panelists with a wealth of background information about the City and the Site. This information allowed the panelists to understand the existing conditions and related issues that would ultimately help formulate their final conclusions. On October 28, 2014, a meet and greet was held between the panelists and representatives from the City. Following the meeting, the panelists toured the Site. The panelists gathered again on November 10, 2014 to further analyze the key issues. Recommendations from the community and developers were evaluated in great detail. Additional due diligence and research was completed by the panelist, following an analysis of the 10 most popular suggested uses referenced in over 180 mailed and emailed responses, which led to the panelists' determination that a mix of uses should be considered for at the Site.

The TAP assembled on December 11, 2014, for an all-day work session to discuss findings, create recommendations and prepare for a special session of the City Council that evening. Approximately 50 people attended a public meeting, including Council Members, City staff, representatives of local neighborhood associations, residents, property owners and other interested stakeholders. The response received during Public Comment was positive. It appeared that the public was appreciative of City Council's use of ULI as a **tool** and ULI's thoughtful analysis of and the recommendation to focus on a **mix of uses**. Comments from the public were also directed toward the condition of current amenities; repairs and improvements were suggested. City Council and staff will need to consider addressing the funding needs of existing or pending amenities in conjunction with the possibility of designing and constructing new amenities at the Site. Regardless of what the City Council considers and approves to build on the Site, community support and/or opposition will be strong unless a comprehensive plan is created.



Panelists touring the Site.

To present a visual example of how the City might create a mix of uses and maximize revenue, while minimizing costs for future improvement and/or development of the Site, at the December 11th City Council Special Session, the ULI panelists presented three design concept. Estimated development costs associated with each concept were derived from local analogues and experiences of the panelists. Concepts included areas for residential development as an opportunity to fund recreational development through the sale of a portion of the Site. Estimated sale costs of a portion of the Site were underwritten at several densities, for example, higher densities have the potential to generate more revenue. This is explained further in the Potential Residential Revenues Section.

In summary, the TAP panelists concluded their presentation with main conclusions: 1) Identify, narrow, and prioritize the public uses with public input and professional expertise, 2) consider a mix of public uses and 3) maximization revenue, minimize costs. Also contained within these three main points are various aspects that they City and Staff should consider as they move forward in determining future improvements for the Site.

Assignment & Process

The TAP Process

The City engaged ULI to conduct a TAP study for the purpose of determining future development at the Site. On October 28, 2014, ULI panel members met with representatives from the City to determine the scope of the panel assignment. The selected panel members were chosen based on their practical and professional skills that address the stated objective for the TAP as provided by the City. During the meeting, the City's vision, goals, and objectives were discussed. Prior to the meeting, the City distributed a packet of information that included general plan documents, maps, responses to Requests for Letters of Interest (RFIs), the newly approved Parks and Recreation Master Plan, the Community Profile Outline, and Housing Element. The City elaborated on the history of the Site, provided all of the responses to the request for suggestions and ideas, the recently completed Parks and Recreation Master Plan, and current issues facing the community. The team also had the opportunity to tour and the study area. City representatives who participated in these discussions included:

- Mark Pulone, City Manager
- Dave Christian, Finance Director/Assistant City Manager
- Steve Harris, Community Development Director
- David Brantley, Principal Planner
- Michael Wolfe, Public Works Director/City Engineer
- Matt Simonetti, Assistant City Engineer
- Bill Calkins, Parks and Recreation Director
- Pam Stoker, Economic Development Manager
- Colleen Callahan-Litfin, Project Manager

On October 28, 2014, Todd Pennington, John Shumway and Phyllis Alzamora attended the General Plan Advisory Committee meeting; introduced by Steve Harris, Community Development Director, the ULI members described what a ULI TAP is and how the process will be conducted leading up to TAP day. The panelists met again on November 10, 2014 to further analyze the key issues before the day-long TAP. This analysis is discussed in a later section. The day-long TAP took place on December 11, 2014 and concluded at a City Council meeting.

Key Issues

ULI asked the City to provide them with questions for them to determine the Scope of Work. The City posed one important question to the panelists:

What opportunities are available in terms of future improvement and/or development of the 40-acre Site for civic, public, and/or other use in accordance with its vision and goals?

City's Vision/Goals

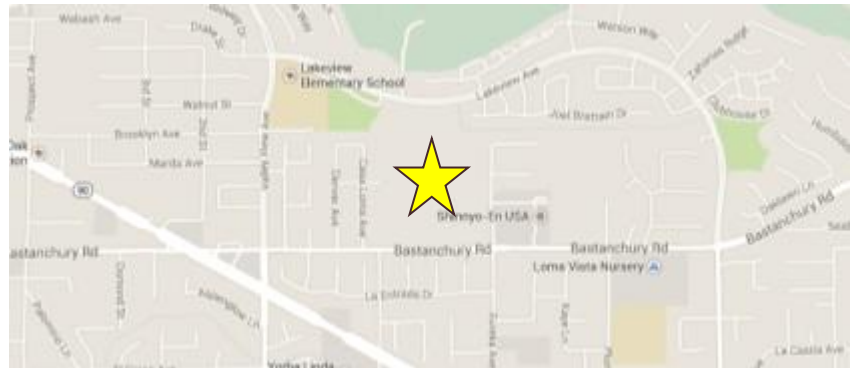
Future development of the Site should meet the following criteria:

- Benefit the general public
- Fill a need in the community
- Integrate into the surrounding community
- Be financially and operationally funded

History of the West Bastanchury Site

Location

The Site is located on the north side of Bastanchury Road, between Casa Loma Avenue on the west and Eureka Avenue on the east.



Source: Google Maps

Ownership

The Site is comprised on three properties, which are referred to as the Tank Farm Site, Main Site, and Base Site. In 1977, the City purchased the Base Site (approximately 13.5 acres). This site does not have any restrictions. In 1993, the Main Site (approximately 19.37 acres) was assigned the Area Plan (Shell Property) designation. Two years later, the City adopted the Shell Master Planned Community Specific Plan, which included restrictions and provided the City the opportunity to purchase the Main Site and the Tank Farm Site.

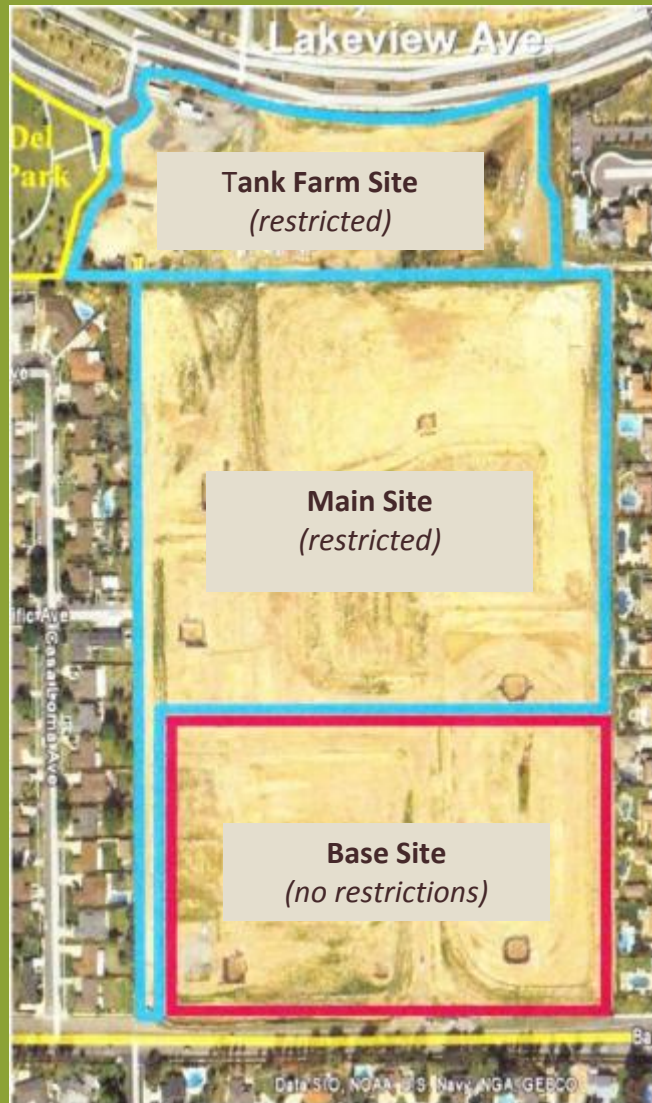
On March 4, 2003 the City and Yorba Linda Friends' Church ("Church")(also referred to more commonly as Friends Christian High School) entered into a ground lease for the Base and Main Sites. The Church intended to improve the Base and Main Sites with a school, joint-use athletic facilities, and assembly hall; some grading of the Base and Main Sites, along with mitigation efforts pertaining to the previous oil well/hazardous materials issues. The Church ultimately defaulted on the lease payments and the lease was terminated by the City on May 21, 2013. The Site has since reverted back to the City.



Aerial photograph of the site (1995).



Aerial photograph of the site (2014).



Source: City of Yorba Linda

Tank Farm Site — RESTRICTIONS

- 7.63 acres
- Zoned PD (Planned Development)

Main Site — RESTRICTIONS

- 19.37 acres
- Zoned PD (Planned Development)

Base Site — NO RESTRICTIONS

- 13.5 acres
- Zoned RE (0) (Residential Estate with an Oil Overlay)

Physical Characteristics

The Site is approximately 40 acres. There is an approximate 100-foot elevation change from the north to south of the Site. There are several mass graded pads, which were created by the previous leasee, Yorba Linda Friends Church(Friends Christian High School). The Site has limited infrastructure improvements. The site is accessible to vehicles from two southern entry points off of Bastanchury Road. There are electrical overhead lines along Bastanchury Road. Other notable features are a 79-inch Metropolitan Water District Line that has a 40-foot easement and an 8-inch sewer line with a 20-foot easement, which run north-south and are generally located along the western boundary of the Site.

Adjacent uses are residential and recreations; Vista Del Verde Park is located northwest of the Site. According to the City's Trail Use Map, the Site is well connected to riding and hiking trails.

General Plan Designation

The General Plan designation for the property is defined as Medium Low Density (1.8 dwelling units per household) for a portion of the site and Planned Area (former Shell Property) for the remainder of the site. The panelists are aware that an update effort to the existing General Plan is currently underway.



Topographic map of the Site depicting access points, utility easements, and elevation change.

Zoning

The Base Site is zoned RE (O) Residential with an Oil Production Combining (Overlay) Zone. Permitted uses with this district include single family residences and recreational uses.

The Main Site and Tank Farm Site are zoned Planned Development (PD-27 Vista del Verde). Although these two properties are owned by the City, they are subject to deed restrictions as contained in the Option Agreement with Shell Western E&P Inc. (SWEPI). The Option Site Agreement includes the fact that no development of housing can occur on these two properties. The City could contact Shell (SWEPI) to determine if the land use restrictions on the Option Sites can be lifted.

Restrictions

The Option Site Agreement states the following allowable uses for the Main and Tank Farm Sites:

- Child and/or adult day care facility
- City Hall facility
- Civic center buildings
- Community center
- City vehicle and equipment storage facilities
- Community garden
- Fire facilities
- Library
- Museum
- Police facilities
- Post office
- Private high school
- Public high school
- Senior citizen center
- Recreational and/or athletic facilities, including but not limited to one or more of the following: parks; playgrounds; baseball fields and facilities; football fields and facilities; golf facilities; indoor and/or outdoor recreational courts, rinks and facilities for basketball, volleyball, tennis, paddle tennis, racquetball, squash, handball, ice hockey, roller hockey, ice skating, skateboarding, gymnastics, flying disc golf, swimming and aquatics, lawn bowling, and bicycling; and ancillary facilities related to the above.

Analysis

Responses/Expressions of Interest to City RFI

The panelists reviewed all of the responses/expressions of interest to the City's Request for Interests (RFIs). As ULI members were not engaged as a review panel or judging panel, the panelists felt the most objective response to the City's key issues was to review all of the suggested uses received via regular mail and email, and not judge each of the 5 more formal Requested Letters of Interest, but look at the individual components/amenities proposed in each. The panel felt that the City should eventually review such more formal RFI's or proposals in the future, if they so choose. Over 180 responses (via regular mail and emailed suggestions and the RFIs), were received by the City, which suggested 38 different uses for the Site. The TAP chose to focus an analysis on the 10 most mentioned uses, which are list below, but in no order of priority:

- Childs' Park
- Church
- Community Events
- Dog Park
- Equestrian
- Homes
- Library
- Skate Park
- Sports Complex
- Tennis Courts

Please note these top 10 suggested uses should not necessarily be viewed as a response to a voting ballot. The Panelists understand that some stakeholders/residents/community groups may have "louder voices" or the ability to gather and outreach to like stakeholders. However, that being said the TAP panel continued along this path, but also referencing the needs outlined in the Parks and Recreation Master Plan, and the history of the site, along with acknowledging the physical characteristics and limitations of the property. Provided on the following page is a list all of the 38 uses and summaries of the five RFIs.

Thirty-eight (38) Uses Suggested:

- Amphitheatre
- Basketball Courts
- Bowling Alley
- Child's Park
- Church
- City Gym
- City Storage
- Civic Center (City Hall)
- Cemetery
- Commercial Office
- Community Events
- Community Gardens
- Concerts
- Cultural Heritage Center
- Day Care
- Dog Park
- Education
- Equestrian
- Fire/Police Facility
- Homes
- Lake
- Library
- Medieval Village
- Museum
- Parking
- Pool
- Private High School
- Public Art
- Restaurant
- Senior Center
- Skate Park
- Sports Fields/Complex
- Tennis Courts
- Theatre
- Trails
- Villas/Hotel
- Water Park
- Western Theme Park

RFI Proposals Submitted:

- Child's Park, Community Events, Parking, Pool, Restaurant, Sports Field/Complex, Villas/Hotel
- Church and Parking
- Church, Day Care, Equestrian, Estate Homes (current zoning, 1.8 units per acre), Private High School, Sports Field/Complex
- Homes (current zoning, 1.8 units per acre)
- Homes (increase zoning, up to 4 units per acre)

SWOT

A Strength, Weakness, Opportunities, and Threat (SWOT) exercise was conducted to analyze the top 10 uses. Each use was analyzed for the following considerations:

- The physical needs of the City, including but not limited to housing, parks and recreation, economic development.
- The current market viability, including but not limited to demographics, financing, completion deadline, or other.
- The potential economic returns to the City, including selling or leasing the site, long-term revenue stream versus long-term service costs.
- The potential environmental impacts (i.e., access, level of service, drought, hazardous materials, noise, light, soils, ecology, and adjacent land uses, etc.).
- The potential for zone changes that could potentially allow for highest and best use.
- The potential impact of the deed restrictions.

The results of the SWOT analysis are provided on the following pages.

	Positive	Negative
External	Opportunities	Threats
Internal	Strengths	Weaknesses

SWOT Exercise applied to each of the top 10 land uses.



Images courtesy of KTG Group, Inc.

Children's Park

Opportunities

- Complement other uses
- Community amenities
- Construction costs funded by development of new homes
- Family-oriented brand

Threats

- Dependent on future land use
- City has many public parks

Strengths

- Little footprint
- No deed restrictions
- Compatibility with adjacent land uses
- High demand for active playground-type amenities

Weaknesses

- Large demand for parking
- Determine what is the neighborhood need
- Liability
- Cost of construction
- Low economic return



Keith Homan / Shutterstock.com

Church

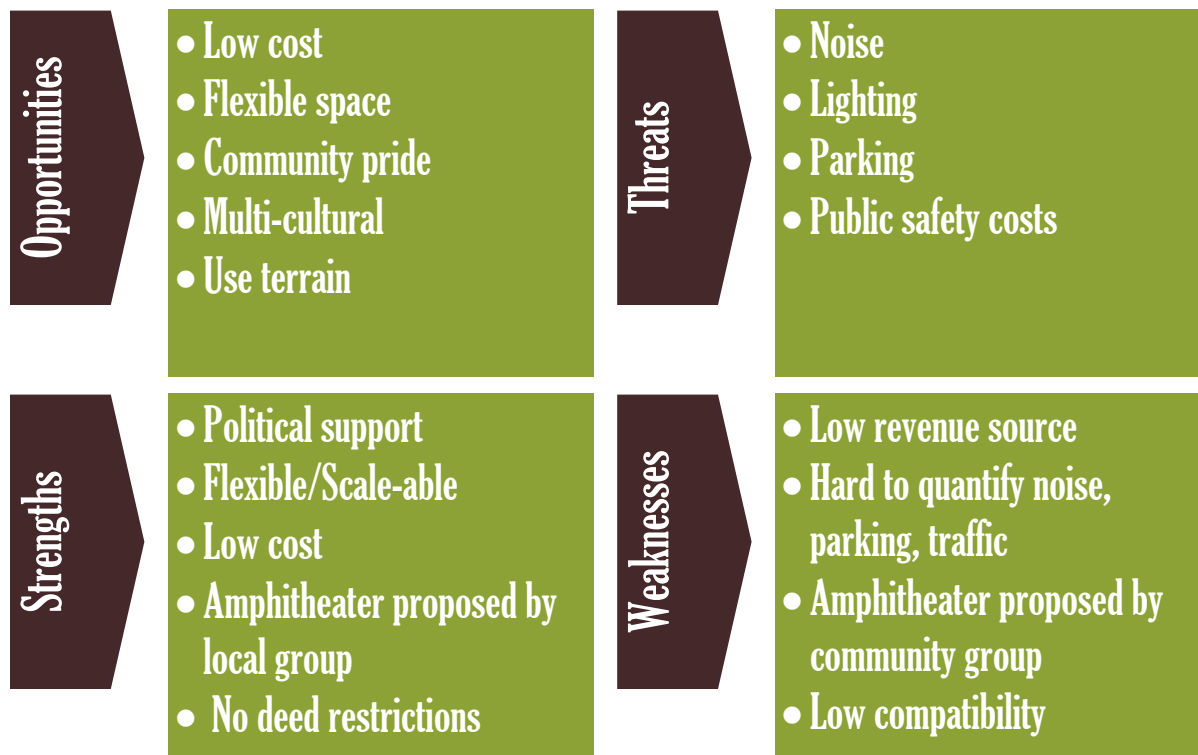




Image courtesy of KTGy Group, Inc.

T photography / Shutterstock.com

Community Events*



**includes uses such as an amphitheater, community garden, and concerts*



Sam Kittner / KTG Group, Inc.



Image courtesy of KTG Group, Inc.



Image courtesy of KTG Group, Inc.

Dog Park

Opportunities

- Able to use natural terrain
- Demand
- Community amenity
- Used by elderly & handicapped
- Construction costs funded by development of new homes

Threats

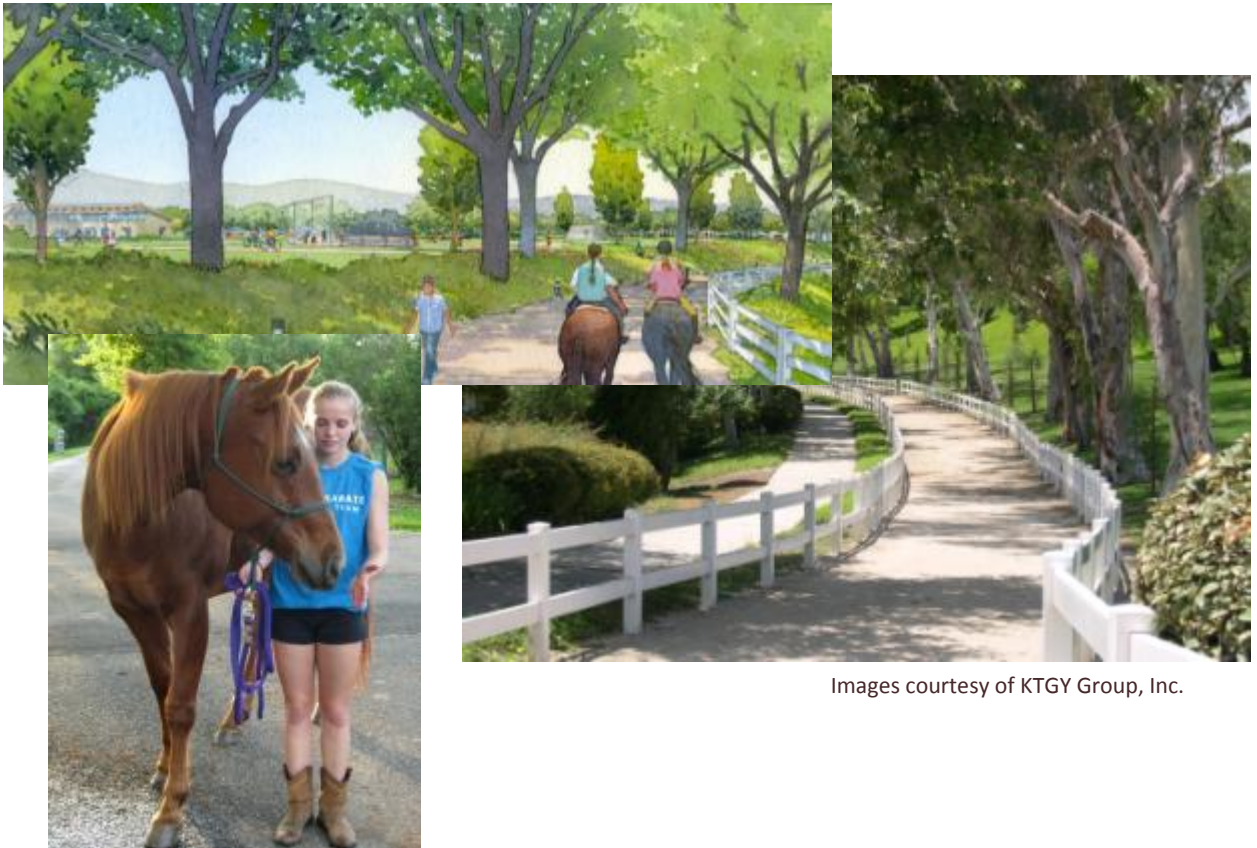
- Physical conflict with horses and kids
- Dogs vs. Horses
- Competing locations outside the City

Strengths

- Low construction cost
- Small footprint
- Social catalyst
- No deed restrictions

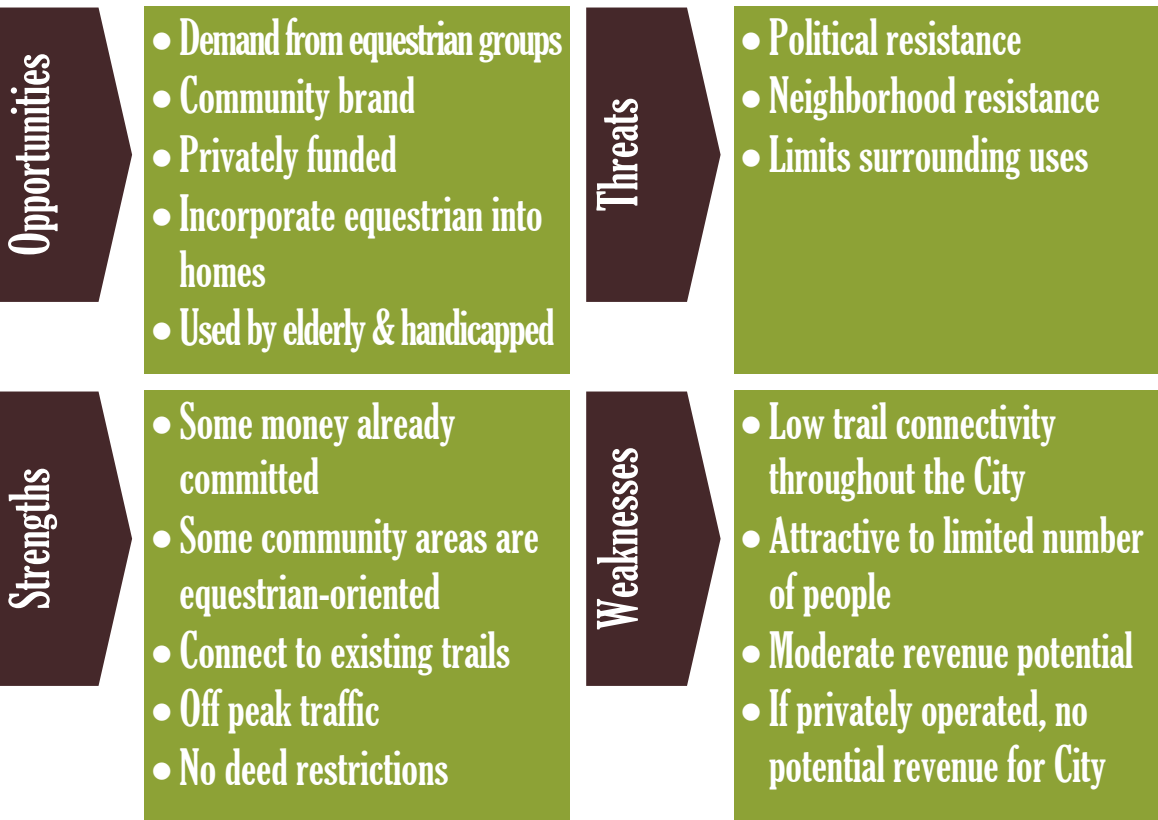
Weaknesses

- High traffic
- Maintenance costs
- Parking, Noise
- Dog park already planned in the City
- Low economic return



Images courtesy of KTG Group, Inc.

Equestrian





Eric Figge / KTG Group, Inc.com



Eric Figge / KTG Group, Inc.com



Eric Figge / KTG Group, Inc.com

Homes

Opportunities

- Views
- Increase density
- Immediate revenue
- Option for sale or long-term lease
- Compatible land use

Threats

- Limited access
- Increased traffic
- Block existing home views
- Resistance to density
- Appraisal values change & are subject to market fluctuations

Strengths

- Aligned with area planning
- Revenue to support capital improvement projects (e.g. infrastructure, parks, etc.)
- High compatibility with adjacent land uses

Weaknesses

- Low density zoning
- Deed restrictions
- Housing long-term net loss for City
- City not deficient in housing
- Political
- No growth city



Images courtesy of the Yorba Linda Public Library Space Needs Assessment and Building Program (2011).

Library

Opportunities

- Architectural opportunity
- Existing library is dated
- Share uses with civic center/city hall
- Community use

Threats

- Dwindling demand as a result of new technology
- Competing locations for places to read (i.e. coffee shop)

Strengths

- Wide use of City
- All ages
- Partial funding available
- Multi-use, flex space
- No deed restrictions

Weaknesses

- Little economic return
- High cost
- High parking requirement



Images courtesy of KTGy Group, Inc.

Skate Park

Opportunities

- Complement with sports and community use
- Demand
- Private funds available
- Increasing popularity

Threats

- Insurance
- Other location in development
- Is the demographic strong?
- Single use
- Concrete is not flexible

Strengths

- Demand (ages 6-26)
- Rental use
- Small footprint
- Low maintenance cost
- No deed restrictions
- Compatibility with topography

Weaknesses

- Security issues
- Noise
- No revenue
- Operational costs (i.e. staff)
- Liability insurance



Doug Jamieson / KTG
Group, Inc.



Image courtesy of KTG Group, Inc.



Image courtesy of KTG Group, Inc.

Sports Complex

Opportunities

- Serve multiple activities
- Family oriented brand
- Indirect economic benefit
- Let other fields rest
- Satisfy parkland and athletic field deficiency

Threats

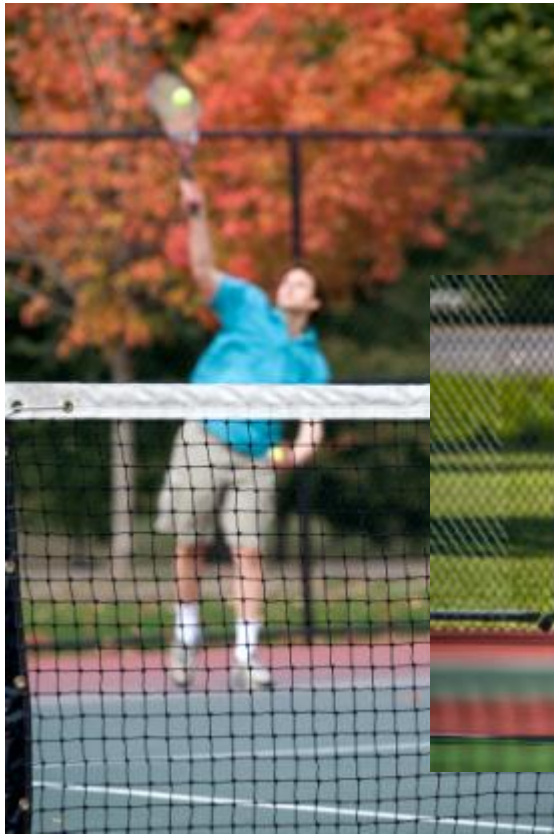
- Lights, noise, traffic, parking
- Lighting and water costs
- Labor

Strengths

- Potential for wide range of use
- Maintenance fees
- Relieve use of other parks
- Regional tournament draw
- Physical location for fields
- No deed restrictions

Weaknesses

- Location from commerce
- Tournament facility requires large footprint
- City need full size lighted-soccer/multi-purpose fields
- High cost



Images courtesy of KTGy Group, Inc.

Tennis Courts

Opportunities

- Potential for shared programming with City and 6 courts at YLHS
- Unique regional draw to golf course
- High demand for tennis
- Multi-use (i.e. fustal, pickle ball)

Threats

- Not usually flexible
- Not sure of competitive options in surrounding cities
- High real-estate, few people

Strengths

- Small footprint
- Works with the high-end brand of the city
- No deed restrictions

Weaknesses

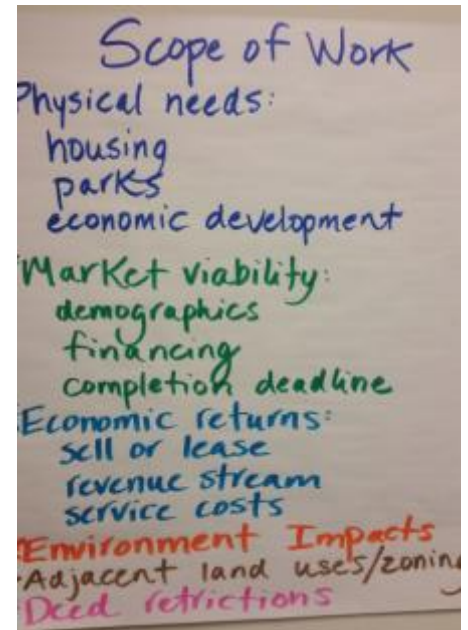
- Not net revenue
- Little secondary use
- Not many users at once
- Maintenance costs
- 10 court minimum for tournaments

Synthesis of Design Considerations

Site Planning

Since the Site is well connected to the City's hiking and equestrian trails, the panelists prioritized maximizing the connectivity. The panelists remarked that the Tank Farm site, in particular, offers "fantastic" views. Also, designing with the natural terrain, including its significant slopes, creates both opportunities and challenges.

The panelists relied heavily on the *Demand & Needs Analysis* provided in the City's Parks and Recreation Master Plan. The demand and needs analysis evaluated both quantitative and qualitative data to create a successful park and recreation program. Significant findings within the report are that full-size soccer (multi-purpose) fields with lighting are in demand, there are field use conflicts and ongoing city-wide field maintenance needs



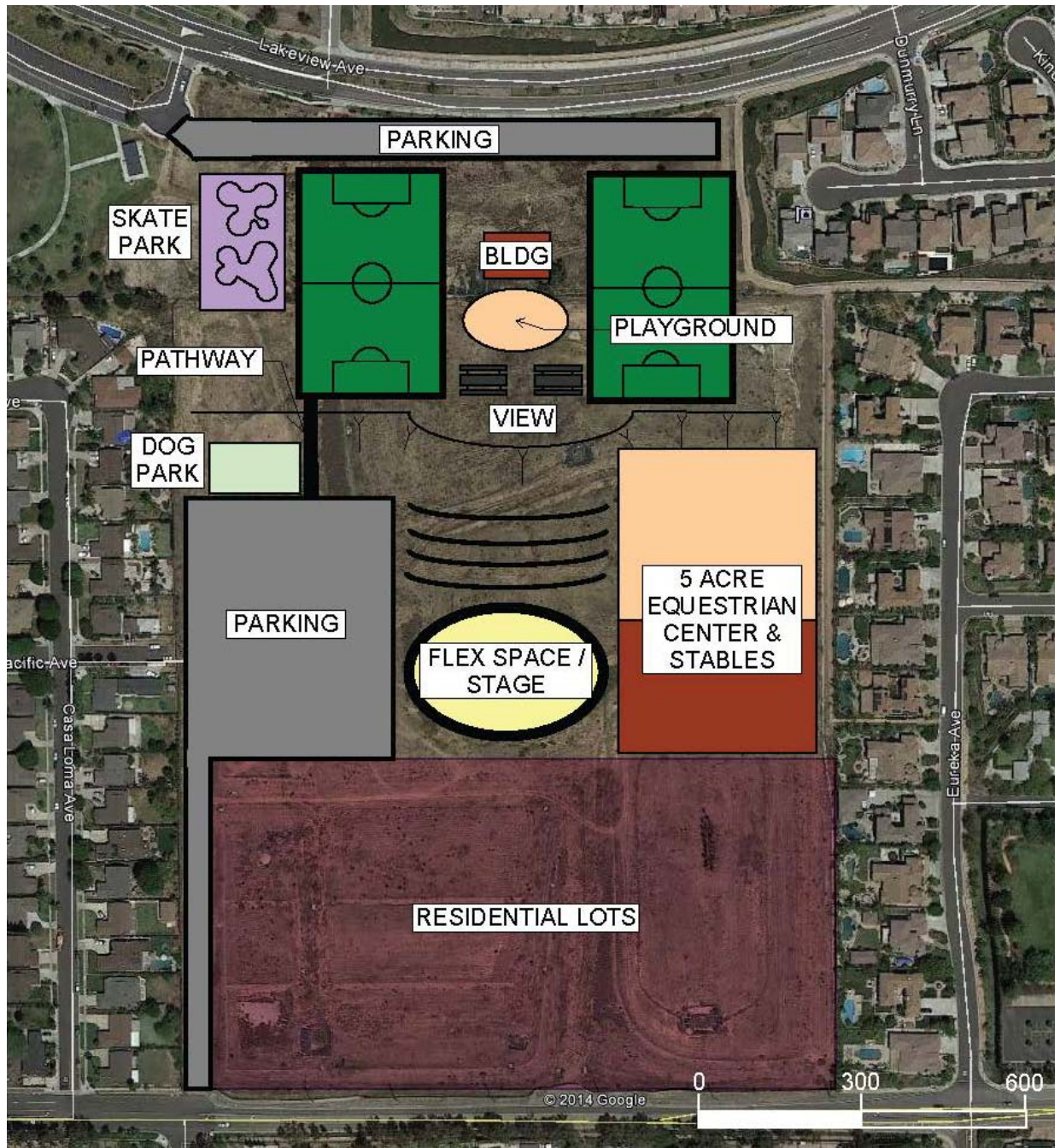
A common theme within each of the concepts is family-oriented use. The panelists envisioned a community park with a myriad of uses that could be enjoyed by an entire family, and during one visit: perhaps a daughter playing soccer while their younger sibling is having fun at the playground. In Concepts A and B, the panelists oriented the residential development on the Base Site and discussed the possibility of integrating an equestrian center and stables with the homes. In all of the concepts, parking and access was designed over existing utility easements, which enables the City to maximize space for development.

Upon reviewing and analyzing the Site, panelists determined that a **mix of uses** is the most viable option to proceed. The panelists sought to design three (3) site concepts that maximized the highest and best use of the top 10 uses. The topography, existing improvements, adjacent land uses, and accessibility were taken into consideration. The demands and needs of the community will change over the years. The panelists designed the concepts with flexibility for future recreational development.



Panelists hard at work during the SWOT Session.

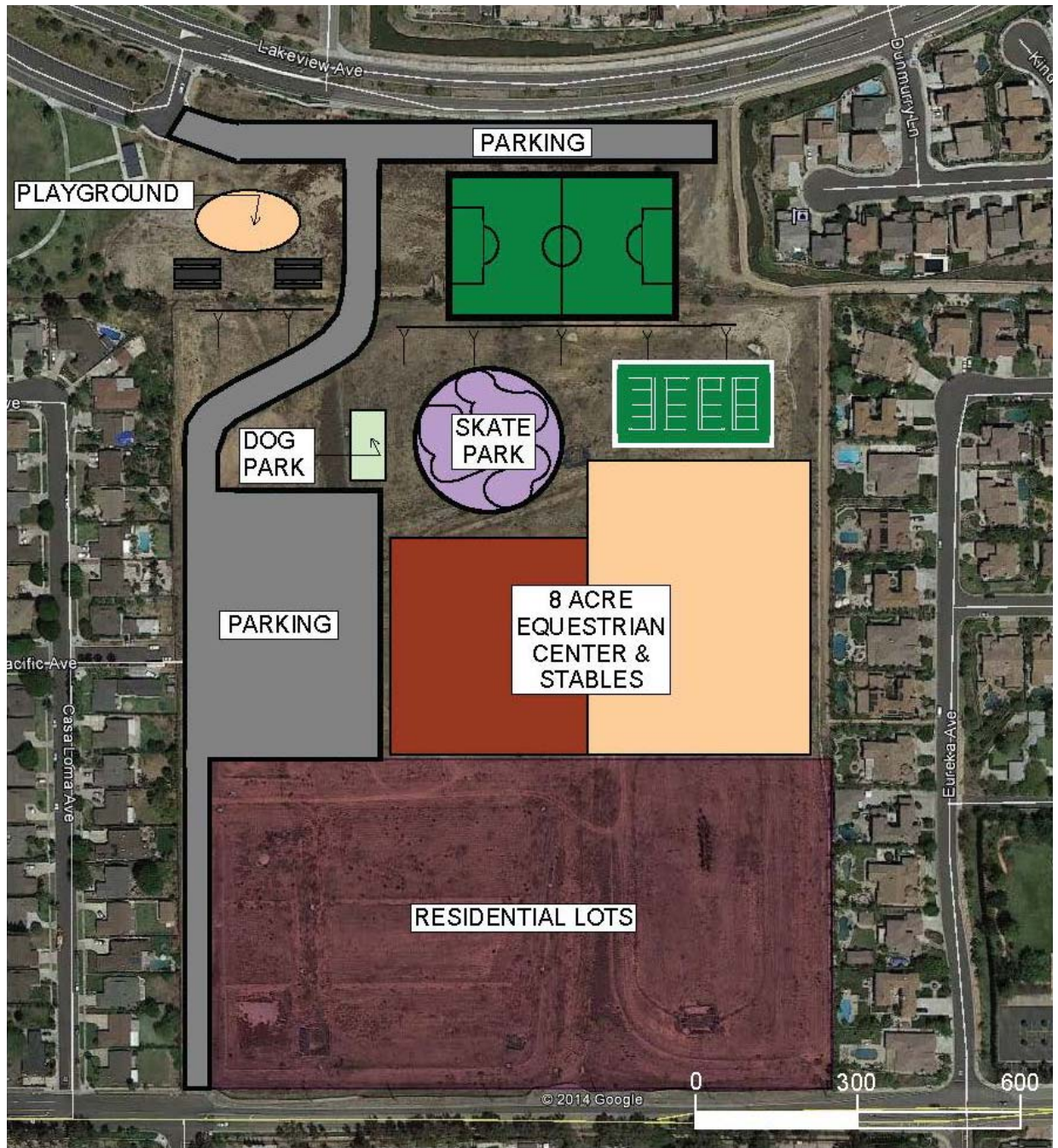
The concepts on the following pages are designed to scale; however, areas of specific land uses are merely used for illustrating.



Concept A

This concept is the most intense design and involves significant earthwork.

- Two (2) natural turf soccer fields
- Playground
- Dog Park
- Community building
- Restroom
- Amphitheater & dirt stage built into existing slopes
- Five (5) acre equestrian center
- Skate Park



Concept B

This concept provides north-south vehicular connection through the Site.

- One (1) natural turf soccer field
- Playground
- Four (4) tennis courts
- Dog Park
- Skate Park
- Picnic area with views
- Eight (8) acre equestrian center



Concept C

This concept presents residential development on portions of the Site that possess restrictions.

- Traditional Park
- Playground
- Two (2) unlit soccer fields
- One (1) lit artificial turf soccer field with stadium seating
- Restroom
- Skate Park
- Ten (10) acre equestrian center

Development Costs

Development costs for the recreational land uses were derived from regional analogues and industry standards. Site development costs include infrastructure needs, both on-site and off-site, direct construction, and hard cost contingency. The costs listed below are dependent on market and economic factors; future construction costs should be reassessed by the City. Please note that these concepts are all based on use of approximately 27 acres of restricted Public Uses properties, with the other approximate 13 acres for unrestricted residential.

Concept A

This concept is the most intense design and involved significant earthwork.

- Two (2) natural turf soccer fields
- Playground
- Dog Park
- Community building
- Restroom
- Amphitheater & dirt stage built into existing slopes
- Five (5) acre equestrian center
- Skate Park

\$17.4m

Concept B

This concept provides north-south vehicular connection through the Site.

- One (1) natural turf soccer field
- Playground
- Four (4) tennis courts
- Dog Park
- Skate Park
- Picnic area with views
- Eight (8) acre equestrian center

\$15.4m

Concept C

This concept presents residential development on portions of the Site that possesses restrictions.

- Traditional Park
- Playground
- Two (2) unlit soccer fields
- One (1) lit artificial turf soccer field with stadium seating
- Restroom
- Skate Park
- Restroom
- Ten (10) acre equestrian center

\$16.4m

Operational and Maintenance Costs

Operational and maintenance costs were not factored into the estimates because they vary greatly by public agency and type of installation. The TAP understands that the City estimates approximately \$13,000 an acre to maintain a sports park with natural turf.

Equestrian Considerations

An equestrian facility has been included in each of the concepts for the City of Yorba Linda as an important recreational use compatible with the City's commitment and regional identity as a semi-rural outdoor lifestyle community of *gracious living*.

A new equestrian facility has been planned as part of the City's Parks and Recreation Master Plan in the City for many years, and funds have been set aside for the building of the facility. This site is the most appropriate for the new equestrian facility because it will directly connect to the City's existing, extensive trail system with easy access to the Chino State Park, just to the north.

A new equestrian facility enhances and strengthens the City's regional image as a desirable community of rolling hills and open space. Although the City has a fine system of equestrian trails and superb access to a desirable State Park (Chino State Park), the City lacks a contemporary, modern equestrian facility that cements the City's culture as a rural, open-space lifestyle destination. A new equestrian facility will appeal to a wide array of Yorba Linda demographics, including seniors, young children and outdoor enthusiasts of all incomes who embrace the community's nostalgic ranch heritage. Moreover, a leading trend in equestrian facilities is providing horse riding and teaching to community members who may not own a horse, but wish to learn. Another important trend is providing professional physical and mental therapy professionals at an equestrian facility who are trained to assist the disabled in a modern equestrian setting.

The City's subject site is an exceptional opportunity to ensure that the City of Yorba Linda maintains and highlights its "brand" as one of North Orange County's premier communities appealing to the equestrian culture. Should this opportunity not be taken, the City of Yorba Linda risks that no other site with excellent equestrian culture connectivity will become available over the next ten to 20 years. This site maximizes the appeal and compatibility of the equestrian culture, and builds upon Yorba Linda's reputation as a community of gracious living.

Potential Residential Revenues

City Funding

Any recreational improvements to the Site will require expenditure of public funds. An opportunity for the City to fund the recreational improvements is to sell a portion of the Site to a developer. It is important to note that the City's budget is balanced, but that there is also currently a funding gap due to the loss of redevelopment bond monies for pending community developments that included a Town Center and New Library, along with the numerous unfunded Capital Improvement projects.

Market Viability of the Base Site

Utilizing recent transactions and market data, the panelists went through the process of underwriting three (3) revenue alternatives that the City can assess for the Base Site. The alternatives evaluated different residential densities.

Current zoning allows for densities up to 1.8 units per acre. An appraisal that was completed for the City in January, 2013 provided a value of \$16.5 million. This is also the approximate value that they received from developers who responded to the Request for Letters of Interest. The panelists also took recent adjacent developments into consideration. A similar method was used to generate potential sale prices of densities of 2.6 and 3.5 units per acre (u.p.a.). It was noted that the residences west of the site appear to be a similar density to 3.5 units per acre. A summary of the panelists' findings is provided below:

		Potential Sale Price*
Current Zoning	Density: 1.8 u.p.a. No. of Homes: 24	\$15.2m
10,000 SF Lots	Density: 2.6 u.p.a. No. of Homes: 35	\$17.1m
7,000 SF Lots	Density: 3.5 u.p.a. No. of Homes: 47	\$20m

* The figures above are based on 13.5 acres (Base Site) of raw land value (concepts A & B). These estimates are dependent on market and economic factors; a professional appraisal should be considered by the City.

Conclusions

The panelists finished their presentation with these three conclusions, which include actions to be considered by the City for next steps, see below.

The TAP would like to remind the reader that it's focus or limitations of the report was on the possible uses at the site, and that this report does not include, yet extremely important to the future determination of the Site: 1) taking into account the operational costs of public facilities, 2) the impact of the deed restrictions related to the value of the property, and 3) the fiscal viability of submitted proposals, particularly the five Request for Interest responses.

Identify, narrow, and prioritize the public uses with public input and professional expertise.

- Review existing RFI responses in more depth (and refer to the Parks and Rec. Master Plan) (great start!) and/or create and distribute a Formal Request for Proposals.
- Utilize information gathered from ULI TAP report through conducting Open Houses/Workshops
- Steering committee of stakeholders
- Hire site planner, and other professionals as needed

Consider a mix of public uses.

- Each use has varying degrees of issues to consider
- All uses have been proven to be compatible with site
- These three concepts are a proof of concept that this large site could accommodate a synergy of uses
- Not all of the uses may ultimately be developed at this site
- Scale to local not regional needs
- Recreational uses may not be revenue producing

Maximization Revenue, Minimize Costs.

- Consider value of alternative residential uses
- Streamline General Plan/Zoning approvals
- Prepare a detailed RFP to solicit proposals
- Consider an Option Agreement
- Consider validating residual land value to obtain a more accurate appraisal
- Minimize improvement costs
- Maximizing revenue allows for flexibility in development of recreational amenities.

About the Urban Land Institute

The Urban Land Institute (ULI) is a nonprofit research and education organization supported by its members. Founded in 1936, ULI now has more than 30,000 members worldwide representing the entire spectrum of land use and real estate development disciplines working in private enterprise and public service.

ULI Orange County/Inland Empire is one of the 10 largest ULI District Councils in the world with 940 members.

The mission of ULI is to provide leadership in the responsible use of land and in creating and sustaining thriving communities worldwide. The ULI has been a leader in smart growth, mixed-use development, urban redevelopment, transportation and affordable housing. ULI facilitates an open exchange of ideas, information, and experience among industry leaders and policy makers dedicated to creating better places.

About ULI Technical Assistance Panels (TAPs)

Since 1947, ULI's Advisory Services Program has been assisting communities by bringing together panels of seasoned real estate, planning, financing, marketing, and development experts to provide unbiased pragmatic advice on complex land use and development issues.

The ULI District Councils provide panel services of one day. A fee is charged for the advisory service, and the funds are used to further the research and educational activities of the District Council. Panel members volunteer their time and are not compensated in any way. To ensure objectivity, panel members cannot be involved in matters pending before or be working for the sponsor and cannot solicit work from the sponsor during the panel's assignment period. The District Council assists the sponsor in refining the scope of the assignment and organizing the panel efforts. Panels are then formed to provide expertise to address the issues. At the conclusion of the work period, the panel issues a report with recommendations to the sponsor.

Panelists' Bios

Linda Congleton, Principal, L.S. Congleton & Associates

Linda S. Congleton, principal of L.S. Congleton & Associates (LSCA), brings nearly 30 years of experience to client assignments. A graduate of the Stanford University Graduate School of Business, she founded LSCA in 1984, specializing in strategic, market-based, retail real estate consulting. She is an active member of the Urban Land Institute, including serving for many years on ULI's Commercial/Retail Development Council. She has also served on numerous Urban Land Institute Advisory Panels and has spoken at ULI's major conferences. Ms. Congleton is also an active member of the International Council of Shopping Centers.

Ms. Congleton's extensive knowledge of the retail real estate market has been a valued resource to her clients, which include real estate developers, financiers, cities, and state agencies. She is a frequent speaker on major retail trends, on-street shopping district optimization strategies, shopping center investment market fundamentals, and entertainment/dining and lifestyle center topics.

M. Paul Conzelman, Principal/President, SC Development

Paul Conzelman has played a key role in SC Development's property acquisitions, entitlements, management, and financing. Over his time at SC Development and affiliated companies, Paul has acquired, built, and/or financed over \$1 Billion worth of real estate. His initial role within the company of project acquisition and entitlements quickly grew into involvement within every stage of each project's life cycle. Prior to joining SC Development, Paul worked for a San Diego based real estate development company, The Allen Group. He is also a partner at a boutique real estate investment banking firm, Bridgeport Investments. He graduated from the University of San Diego with a Bachelor's degree in Business Administration and later earned a Master's of Business degree with an emphasis in Finance from Chapman University in Orange, CA. Paul is actively involved in the Urban Land Institute and he currently sits on the ULI's Community Development Council (Blue). Paul is also a licensed California Real Estate Broker.

Pamela Galera, ASLA, LEED-AP, Principal Project Planner, City of Anaheim

Pamela Galera, ASLA, LEED-AP, uses her talents and enthusiasm to serve the public by providing open space, recreational facilities and programming to improve the quality of life for the residences, workforce, and visitors of Anaheim. She has served as the Principal Project Planner for the City of Anaheim, Community Services Department since 2007. She manages the Parks Capital Planning section and she is responsible for acquiring and improving open space and recreational facilities. Pamela has worked for the City of Orange, Orange County Transportation Authority (OCTA), and Clark and Green Associates in Costa Mesa as a Landscape Architect.

Pamela is a proponent of Public/Private partnerships that result in sound projects that contribute to the physical and economic health of cities and their inhabitants. Pamela has recently completed the Anaheim Outdoors Connectivity Plan that will link Anaheim residents, visitors and workers to open space, recreation, retail and employment.

David Luzuriaga, PE, LEED AP, Associate, BKF Engineers

David Luzuriaga has had a diverse professional career over the past 20 years involving over 800 projects. His background stretches beyond general civil engineering, including field and design work as a geotechnical engineer, political appointments on the City of Burlingame Planning Commission and the State Board of Professional Engineers and Land Surveyors by past Governor Schwarzenegger. His overall grasp of civil engineering, the process involved and the ever complicated process of permit approvals has consistently appealed to clients.

Todd Pennington, CEO/Founder, Pennington & Company, LLC

Todd Pennington is a visionary strategist with proven success record delivering local/regional Businesses and Focused Business Units, Overall Business Strategic Direction, Risk Management Plans & Real Estate Programs, Projects and related services on-time and within budget, safely to meet/exceed client and company expectations. He is the CEO and founder of a boutique consulting, advisory and strategy enterprise focused on growing companies, delivering projects and solving problems in the built environment with sustainable strategies and optimized solutions.

John Shumway, Principal, The Concord Group

John Shumway is a principal with The Concord Group. John has over 30 years' of experience in market feasibility analysis for both residential and commercial properties. He has managed numerous engagements focused on strategic planning and highest and best use analysis. These engagements have ranged from large master planned communities to higher density mixed-use developments in urban areas.

Mr. Shumway's professional affiliations include the National Association of Home Builders (NAHB), the Building Industry Association (BIA), the National Association of Industrial and Office Parks (NAIOP) and the Urban Land Institute (ULI). Mr. Shumway was selected by ULI to participate on the panel that initially developed and published the Ten Principles for Successful Development Around Transit. He currently serves as Vice-Chair of Technical Assistance Panels (TAPs) and TOD Marketplace for ULI Orange County/Inland Empire.

Oscar Uranga, Project Manager, Shopoff Realty Investments

Oscar Uranga is a highly motivated project manager committed to continuing a long-term career in real estate and planning. Has over 14 years of planning and entitlement experience working in public and private sectors, both as consultant and client. He is currently a project manager with Shopoff Realty Investments. His responsibilities include entitlement processing, community & political outreach, consultant management, acquisition, disposition, underwriting, planning, risk management and asset / property management.

Contributors' Bios

Phyllis Alzamora

Phyllis Alzamora was appointed the first-ever Executive Director of the ULI Orange County/Inland Empire District Council in November 2005. The Orange County/Inland Empire chapter is one of the 10 largest ULI District Councils in the world.

Ms. Alzamora has nearly 30 years of experience working for private companies and non-profit organizations, including Rockwell International, Ricoh Electronics, Hyundai Motor Company, the National Association of Manufacturers, the International Public Relations Association and the Building Industry Association, with specific expertise in communications, government affairs and community relations.

She has a strong background in public affairs, including developing grassroots advocacy campaigns, and significant experience managing media relations as well as philanthropic and civic involvement. She has deep community roots in Orange County and is a descendant of the Jeffrey family, early 20th century land owners in east Irvine. She has a bachelor's degree in communications from California State University, Chico, and a master's degree in business communications from the first fully online, accredited Internet University, Jones International.

Jessica Candaele

Jessica Candaele is a Business Development Professional with KTG Y Group Inc. Over the past 10 years, she has demonstrated project management, business development, marketing, and outreach experience, having worked with leading southern California architectural and engineering firms. She began her career in environmental science, where she conducted and managed real estate due diligence and environmental constraints analysis. Here, she developed a diverse set of skills to address land use issues related to natural resources, energy, and hazardous materials. Her successful engagements with clients led to an increased responsibility of her organization's outreach activities. She has since thrived as a strategic outreach professional with demonstrated success.



ULI Orange County/Inland Empire
2082 Business Center Drive, Suite 280
Irvine, CA 92612

orangecounty@uli.org