

# RFQ No. 13-16 – City Hall Re-Use Project

Newport Beach, CA



**Response to Request for Qualifications**

November 20, 2012

Prepared for:

**The City of Newport Beach**



**Bettencourt  
& Associates**



**1. Qualifications, Related Experience & References**

**AMLI Residential**

**KTGY Group, Inc.**

**MJS Design Group, Inc.**

**Bettencourt & Associates**

**2. Financial Capatibility “Confidential”**

**3. Conceptual Development Approach**

**4. Conceptual Financing Approach**

**5. Appendices and Attachments**

**AMLI Residential**

**KTGY Group, Inc.**

**6. Exceptions to Terms, Conditions etc.**

**7. Proposer Information Form (Attachment A)**

**8. City of Newport Beach Disclosure Statements (Attachment B)**

## 1. Qualifications, Related Experience & References

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**AMLI**

**ktgy**

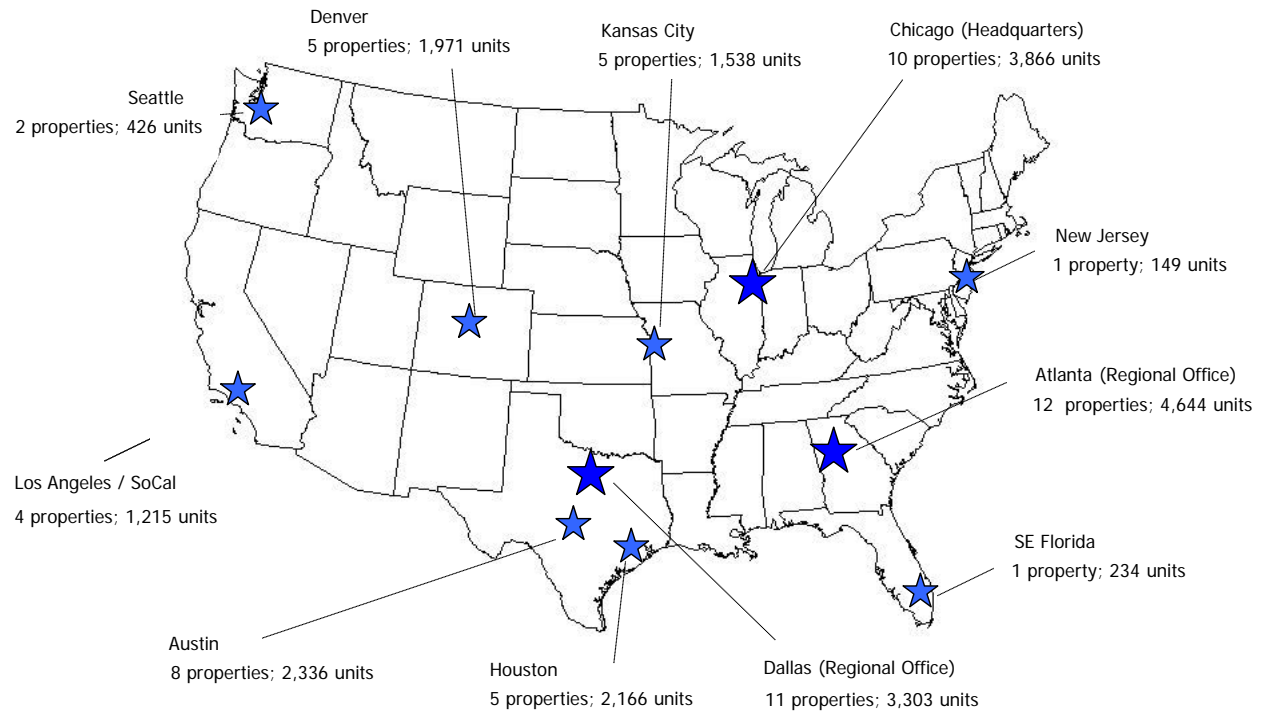


Bettencourt  
& Associates

**AMLI**

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AMLI's National Footprint

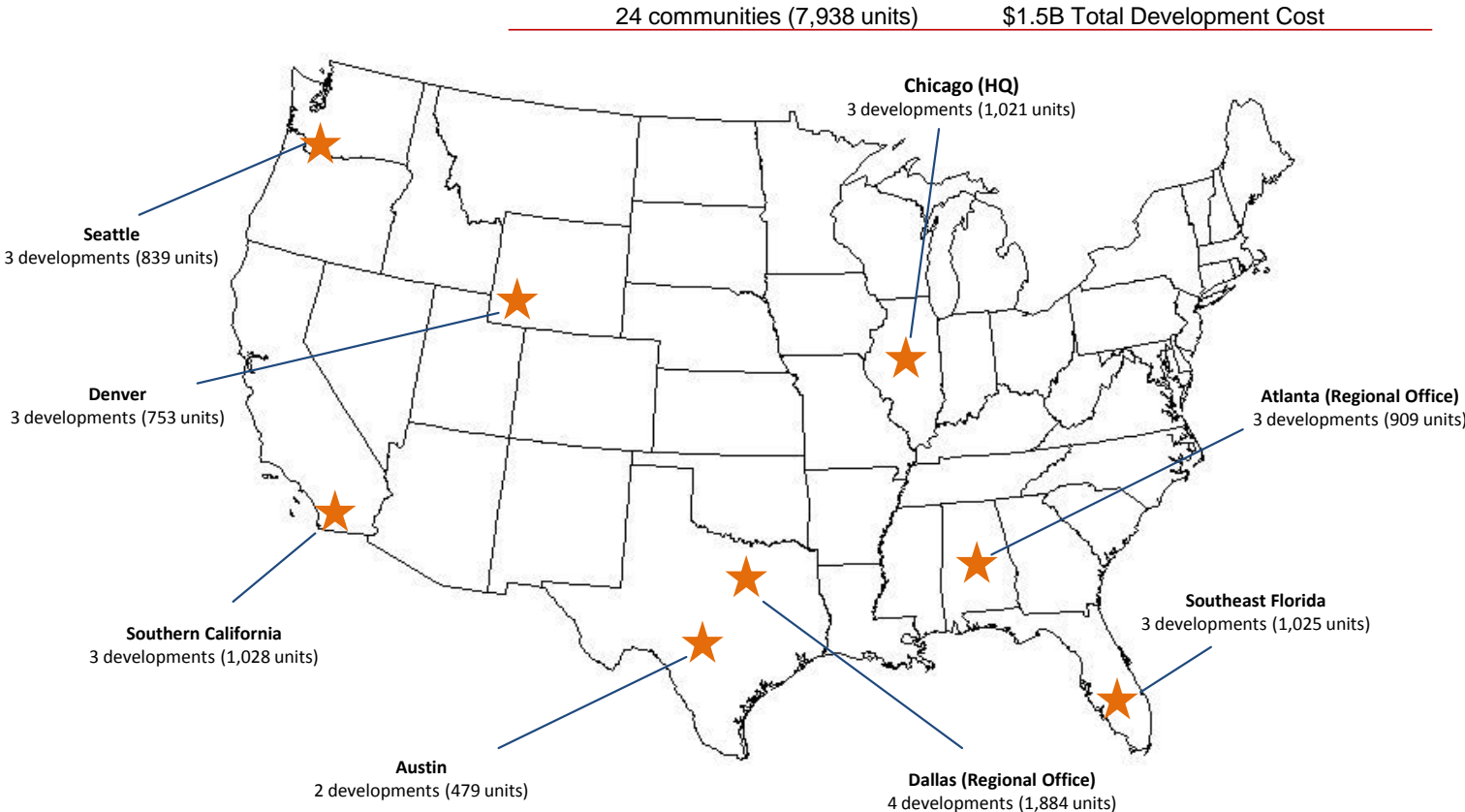


PORTFOLIO DETAILS	
Atlanta	12 properties 4,644 units
Austin	8 properties 2,336 units
Chicago	10 properties 3,866 units
Dallas / Fort Worth	11 properties 3,303 units
Denver	5 properties 1,971 units
Houston	5 properties 2,166 units
Kansas City	5 properties 1,538 units
New Jersey	1 property 149 units
Seattle	2 properties 426 units
South Florida	1 property 234 units
Southern California	4 properties 1,215 units
<b>Total Portfolio:</b> <b>64 Properties / 21,848 Units</b>	

Current Portfolio:

- 64 properties for a total of 21,848 units
- 7,938 units are in development, under construction or in lease-up
- 1,341 units are under 3rd party management operating as branded AMLI™ communities.







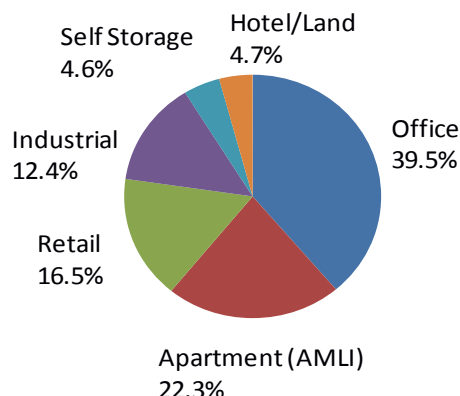
## AMLI Residential

- Is a privately-held real estate company, owned 100% by PRIME Property Fund, specializing in the acquisition, development, management and long-term ownership of luxury Class A multifamily and mixed-use communities throughout the U.S.
- Is a leading national owner, operator and developer operating under the AMLI™ brand name
- Operates in eleven major US markets including Atlanta, Austin, Chicago, Dallas/Ft. Worth, Denver, Kansas City, Houston, Seattle, Southeast Florida and Southern California
- Has a current portfolio comprised of:
  - 64 properties
  - 21,848 units
  - total gross appraised value of \$3.1B (2Q12)
- Formed in '80, went public in '94 and was acquired by PRIME Property Fund in '06
- Has an experienced, stable team and a 30-year track record through numerous cycles
- Employs approximately 750 people
- Has a culture focused on achieving AMLI's mission to "Provide an Outstanding Living Environment for each and every AMLI Resident"
- Since inception, AMLI has acquired approx. 35,266 units and has developed approx. 18,888 units

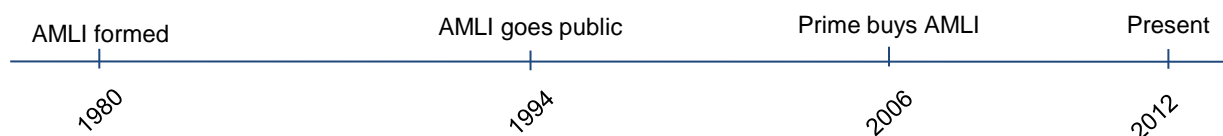




**Prime Property Fund Allocations (3Q12)**



- AMLI Residential is a privately-held real estate investment trust that specializes in the acquisition, development, management and long-term ownership of luxury Class A multifamily and mixed-use communities throughout the U.S.



- Since 1980, AMLI has acquired 35,266 units and has developed 18,888 units
- Currently owned 100% by Prime Property Fund (Prime), Morgan Stanley’s flagship institutional core real estate fund
- Significant JV and institutional experience
  - From 1980 to present, AMLI has formed 106 investment partnerships (65 for acquisitions; 41 for developments)
- Operates in 9 major U.S. markets
  - Atlanta, Austin, Chicago, Dallas/Ft. Worth, Denver, Houston, Seattle, Southeast Florida & Southern California
  - 64 stabilized properties (21,848 units) with a ~\$3.1B gross asset value (2Q12)
  - 24 communities approved/under development (7,938 units) with total development costs of over \$1.5B
- Stable management team with deep experience through numerous cycles
  - 6 of AMLI’s 8 principals have worked together an average of 20+ years
- Extensive, industry-leading operating platform
  - Operates under the AMLI™ brand name
  - Strong revenue and net operating income growth driven by proprietary technology and internet leasing, marketing and revenue management operations





- Brand Awareness: “Operate like retailer. Think like a brand”
  - AMLI’s mission: “Providing an Outstanding Living Environment for Each and Every Resident” Branding each property as an AMLI community signals quality, builds trust, and creates a personal connection with residents
  - Vital to attracting and retaining customers: over 65% of AMLI’s leasing and rental business is originated and transacted online
- Industry-Leading Technology
  - AMLI’s proprietary technology and internet leasing, marketing and revenue management operations drive NOI growth
  - Over \$45M has been invested to develop AMLI’s state-of-the art technology, including:
    - SMART Office (online leasing)
    - RentCheque (rent optimization)
    - AMLIMart (national purchasing)
    - Dashboards (operation measurement tool)
- Culture: “Live Life – Love Life”
  - Over 750 members of the AMLI Famli help execute this promise – “ Provide an outstanding living environment for our residents”
  - Focus on the 4Ps throughout every aspect of our business: “Passion, People, Process, Practice”
- Going Green
  - Aggressively pursuing carbon reduction, LEED certification, and enhanced sustainability
  - Associating AMLI™ brand with ethical environmental behavior and social responsibility directly benefits property performance
  - Reducing energy and water usage reduces costs and increases net operating income (NOI)





**Ground Lease**

**Lessor:** City of Austin  
**Lease Term:** 99 Years  
**Status:** Completed in 2008



**Property Description**

Address	421 W. 3rd St., Austin, TX 78701
Property Type	18-story precast concrete high-rise
Site Size	+/- 1.77 acres (131 du per acre)
Classification	Improvements: A / Location: A
Year Built	2008
Developer	AML I
Rentable SF	208,557
Retail SF	160,000 SF "Retail district map is on the following sheet"
Total Units	231
Average Unit Size	903
Number of Buildings	1
Apartment Parking	4-level parking garage that consists of 403 spaces (1.7 spaces/unit)
Unit Mix Overview	71% 1-BR & 29% 2-BR





Street Retail District Overview



Property Description

DINE

- 36. Ill Forks
- 23. Austin Java
- 48. Cantina Laredo
- 41. Cru Wine Bar
- 15. Froots
- 40. Jo's Hot Coffee
- 3 zpizza
- 19. Lamberts BBQ
- 12. Leaf
- 5. Malaga
- 34. Mama Fu's
- 54. Royal Blue Grocery
- 35. Coming Soon
- 38. Taverna
- 17. teuscher Chocolates of Switzerland & Coffee
- 55. Which Wich?
- 46. Yu Sushi Izagaya
- 9. La Condesa & Malverde

SHOP

- 37. Coming Soon
- 30. Beyond Tradition
- 7. BoConcept
- 31. Coming Soon
- 50. delish
- 43. Design Within Reach
- 28. Eliza Page
- 2. Coming Soon
- 42. Estilo
- 14. Finch
- 22. Fit City Sports
- 6. gallery d
- 39. Girl Next Door
- 32. mercury design studio
- 24. The Home Retreat
- 47. IF+D
- 33. Ligne Roset Boutique
- 27. Lounge22
- 21. Coming Soon
- 18. Lofty Dog
- 8. Minx
- 26. MISSBEHAVE
- 56. Peyton's Place
- 29. Shiki
- 4. SoCO Designs
- 11. St. Bernard Sports
- 13. Wee
- 53. Hästens

RELAX

- 1. Authentic Smiles
- 51. Cathy's Cleaners
- 45. milk + honey spa
- 52. SALON by milk + honey
- 44. studio563



**Ground Lease**

**Lessor:** City of Chicago  
**Lease Term:** 99 Years  
**Status:** Under Construction

**Property Description**



**Development Concept**

**Units / Dev Cost** 409 units

**Product Type:** 49-story high-rise tower with 9 levels of parking

**Site Size:** 0.29 acres

**Retail:** 4,500 square feet

**Unit Mix:** 25% studios / 15% convertibles/ 39% 1bdx1ba/  
18% 2bdx2ba/ 3% 3bdx2ba

**Avg Unit Size:** 866 SF

**Apt Parking:** 272 spaces (0.67 spaces per unit )

**Community Amenities:** Targeting LEED Gold, SMART Office leasing center, entire 12<sup>th</sup> floor amenity level with fitness center, business center, resident lounge, game room, golf simulator room, and connected to an expansive 22,000 SF Greenway Garage rooftop amenity deck with pool , cabanas, fire pit area, kitchen and grill center and outdoor fireplace, pet-park and pet-spa, dedicated bike storage

**Interior Finishes:** 9' ceilings, with 9'6" ceilings on Penthouse (top 6) floors, granite and quartz countertops, stainless steel appliances, roller shades, laminate flooring throughout, upgraded carpet in standard unit bedrooms

## Ground Lease

**Lessor:** Yale Campus LLC  
**Lease Term:** 99 Years  
**Status:** Under Construction



## Property Description

### Development Concept

**Units / Dev Cost** 295 units

**Product Type:** Podium style product - 5-story wood frame construction over 2-story concrete podium over 2 levels of below grade parking

**Site Size:** 1.3 acres

**Retail:** 4,149 square feet

**Unit Mix:** 21% studios / 62% 1bd/1ba, 18% 2bd/2ba

**Avg Unit Size:** 730 SF

**Apt Parking:** 286 stalls (.99 spaces per unit / .85 spaces per bdrm.)

**Community Amenities:** Targeting LEED Silver, SMART Office leasing center, fitness center, business center, landscaped rooftop deck with clubroom, landscaped courtyards, pet-park and pet-spa, dedicated bike storage and bike repair room

**Interior Finishes:** 9' Ceilings (12' on top floor of Phase I), granite or quartz countertops, stainless steel appliances, roller shades, faux wood plank flooring



**Ground Lease**

**Lessor:** Catellus  
**Lease Term:** 99 Years  
**Status:** Under Construction



**Property Description**

**Development Concept**

**Units:** 279 units  
**Product Type:** LEED Silver  
 Wrap style product, 4-story wood frame construction  
 Structured parking garage  
**Site Size:** 3.63 acres  
**Retail:** 7,800 sf of ground floor medical office/retail/restaurant space  
**Unit Mix:** 20% eff / 56% 1bd/1ba, 24% 2bd/2ba  
**Avg Unit Size:** 820 SF  
**Apt Parking:** 437 parking spaces (1.57parking ratio)  
**Community Amenities:** SMART Office leasing center, fitness center, business center, landscaped public paseo, pool, Mueller master plan live, work, play community, Mueller hike and bike trails  
**Interior Finishes:** 9' ceilings, granite countertops, clean steel appliances, faux wood plank flooring, private walk-up patios, views of downtown Austin, UT and 30-acre Lake Park



**Ground Lease**

**Lessor:** Spanish Hills Apartments LLC  
**Lease Term:** 34 Years  
**Status:** Under Construction



**Property Description**

Development Concept

**Unit:** 384 units

**Product Type:** LEED Silver  
2 & 3-Story Walk Up

**Site Size:** 15.7 acres

**Unit Mix:** 55% 1bd/1ba, 40% 2bd/2ba, 5% 3bd/2ba

**Avg Unit Size:** 931 SF

**Apt Parking:** 826 Stalls (2.15 ratio)  
290 Private Garages (59 direct access)

**Community Amenities:** SMART Office, Leasing Center, Fitness Center, Resort Pool, Outdoor Living Room, Business Center, WiFi Lounge, Landscaped Park, Pet-Park, Pet-Spa, LEED

**Interior Finishes:** 9' Ceilings, Granite Countertops, Black Appliances, Faux Wood Plank Flooring







**Status:**  
Under Construction



## Property Description

### Development Concept

- Units:** 310 units
- Product Type:** 4 & 5-story wood frame construction over concrete podium  
1 ½ levels of underground parking
- Site Size:** 2.56 acres
- Density:** 121 du/ac
- Unit Mix:** 75% 1bd/1ba, 25% 2bd/2ba
- Avg Unit Size:** 818 SF
- Apt Parking:** 533 Stalls (1.72 ratio)
- Community Amenities:** SMART Office, Leasing Center, Fitness Center, Resort Pool, Five Landscape Courtyards, Business Center, WiFi Lounge, Outdoor Yoga Deck, Pet-Spa, LEED
- Interior Finishes:** 9' Ceilings, Granite Countertops, Stainless Steel Appliances, Contemporary Lighting, Faux Wood Plank Flooring



Status: Entitlements/Design



## Property Description

### Development Concept

- Units / Dev Cost:** 323 units
- Product Type:** 4 story wood frame construction wrapped around 5 to 6 story concrete parking structure
- Site Size:** 5.36 acres
- Density:** 60 du/ac
- Unit Mix:** 50% 1bd/1ba, 42% 2bd/2ba, 8% 3bd/2ba
- Avg Unit Size:** 884 SF
- Apt Parking:** 668 Stalls (2.00 ratio)
- Community Amenities:** SMART Office, Leasing Center, Fitness Center, Resort Pool, Landscape Courtyards, Business Center, WiFi Lounge, Pet-Spa, LEED
- Interior Finishes:** Granite Countertops, Stainless Steel Appliances, Contemporary Lighting, Faux Wood Plank Flooring





#### **Nate Carlson**

Nate is responsible for development and acquisition activities covering all of Southern California. Prior to joining AMLI, Nate was VP of Development for Sares-Regis Group, a private mixed-use developer based out of Irvine, California. Nate received a B.S. in Construction Management and Business from Brigham Young University in 2006 and is currently pursuing a Masters in Real Estate Development from USC. He is an active member of both ULI and BIA.



#### **Jason Armison**

Jason is responsible for development activities throughout the greater Southern California market. Before joining AMLI, he was Vice President of Development and Operations for Barratt American where he was responsible for all aspects of real estate acquisitions and development. Jason received his Bachelor's degree from Sonoma State University in economics and environmental studies and planning. He received his Master's degree in real estate development and planning from University of Southern California. He is a full member of the Urban Land Institute and a LEED Accredited Professional.



#### **Greg Mutz**

Greg co-founded AMLI in 1980 with John Allen. In addition to being AMLI's CEO, Greg serves on the Board of RBI Holdings, a St. Petersburg, Russia based real estate company (2007-present) and serves on the Board of WAN, S.A., a real estate company headquartered in Warsaw, Poland (2007-present). Greg is a Trustee of the Aston Family of Mutual Funds (1993-present). Prior to founding AMLI, Greg was an officer with White, Weld & Co., Inc., a New York investment banking firm (1976-78) and was associated with the Chicago law firm of Mayer Brown (1973-76). He received a B.A. from DePauw University in 1967 and a J.D. from the University of Michigan Law School in 1973. Greg served as an infantry lieutenant in Vietnam (1968-69).



#### **Allen Sweet**

Allan is President of AMLI Residential. Prior to joining AMLI, Allan was a Partner in the Chicago law firm of Schiff Hardin & Waite, with which he had been associated since 1978. He received a B.B.A. from the University of Michigan in 1968 and a J.D. from the University of Michigan Law School in 1973. From 1980 to 1983, Mr. Sweet was a trustee of American Equity Investment Trust, an over-the-counter equity REIT.



#### **Phil Tague**

Phil is Executive Vice President of AMLI and oversees AMLI's development and acquisition activities. Prior to joining AMLI, Phil was associated with the Chicago law firm of Mayer Brown (1977-81). He received a B.S. from Northwestern University in 1971 and a J.D. from Ohio State University College of Law in 1977. He is an officer and/or member of a number of industry groups including the Atlanta Apartment Association, the Georgia Apartment Association, ULI, NAIOP, REIAC, IDRC, and the National Multifamily Housing Council.



#### **Mark Evans**

Mark has overall responsibility for the allocation of personnel, resources and systems relating to AMLI's construction activities and participates in the planning, development and product selection for our communities. Prior to joining AMLI, Mark was associated with Peachtree Residential Properties (1992-94), Roberts Properties (1990-92), Grove Construction (1986-90), and AMLI Realty Co. (1983-86). Mark graduated from the University of Florida in 1982.







**KTGY Group, Inc.** was founded in 1991 by professionals who shared a common belief in creating a design firm that would perpetuate its success by investing in superior, productive people with positive attitudes and encouraging a team philosophy. This philosophy fosters an environment of support, training, listening and artistry, which has attracted the best and brightest young people, as well as some of the industry's top seasoned professionals. KTGY has offices in Irvine, Oakland and Santa Monica, California, Denver, Colorado and Tysons Corner, Virginia.

Providing planning and architectural design services for residential communities, retail developments, hospitality and related specialty projects worldwide, KTGY translates the client's needs and desires into an aesthetic, workable product that leads to financially successful and awardwinning designs. Our goal is simple, create good designs that are well accepted in the marketplace, appropriate for the end user, and attains the client's profitability goal.

Each team is led by a Principal/Shareholder who is involved from the initial conceptual phase through the construction phase. The teams planners, designers and architects are dedicated to a seamless process. Each client is partnered with a particular team based upon product type and/or region. This allows KTGY to better serve each client's needs by providing a focused team who really knows the local market/product and is current in new technologies. We are focused on helping clients have financially successful projects. The team philosophy has created an exceptional organization built around the success of our builder/clients.





## Corporate Vision

KTGY is committed to the success of its clients. By investing in superior people and continuously seeking business opportunities that ensure long term growth, KTGY delivers professional services with the highest level of integrity in support of its Mission and Core Values.

## Mission Statement

Deliver creative, quality solutions that enhance our built environment.

## Core Values

### Quality

KTGY provides services that add value and exceed expectations.

### People

KTGY respects and empowers people, and its team philosophy develops leaders for future generations of ownership.

### Creative

KTGY promotes innovation and inspiration through continuing education and collaboration with clients and colleagues.

### Communities

KTGY balances the perspective of all stakeholders to create viable and sustainable communities.



## Our People: Delivering on the Vision

At KTGy, we believe it takes more than great ideas to design great places. It takes great people. Here, the energy, talent and creativity of our staff converge with a dedication to exceptional service to deliver successful architectural and planning solutions.

How we work with clients embodies what we value. For almost two decades, KTGy has been as passionate about connecting with our clients and their objectives as we are about design and creativity. Our designs are inspiring and innovative, yet ever mindful of project goals. Our people listen, respond and deliver what our clients need, want and envision.

As a full-service architectural and planning firm, KTGy has delivered a depth and breadth of successful design solutions for:

### Planning

- Master Planning
- Urban Design
- Site Planning
- Entitlement/Strategic Planning
- Government Relations

### Residential

- Single Family
- Multi-Family
- 55+
- Affordable
- Campus Housing

### International

- Residential
- Retail/Commercial
- Hotel
- Convention Center
- Office

### Mixed-Use

- Horizontal
- Vertical

### Retail

- New Development
- Direct Tenant
- Repositioning
- Restaurants

### Commercial

- Corporate Offices
- Tenant Improvement
- Interiors







KTGY Group has a long history of complicated urban infill projects. From high-rise towers in Tokyo to the first supermarket in downtown Los Angeles in fifty years, to ongoing design projects within urban Washington DC, we understand that the key to our success is a deep understanding of place. That understanding extends beyond simply the physical context.

The history of the site, the neighborhood dynamic, as well as, community leaders all contribute to the end result. KTGY embraces this collaboration. We realize that more minds thinking together are better than one alone.

In collaboration with you, the client, our team seeks to develop a vision for the project and then articulate that in a manner that the community is able to identify with this vision.

The leadership of these projects is an art form that we take very seriously. From neighborhood charettes and meetings to formal commission and council hearings, we work to form a collective goal that all stakeholders can embrace. We really do believe that the right design can make a difference.

Each project and site is different and each requires a different strategy and approach. We are willing to be as involved as necessary in the process. We think our years of experience dealing with diverse community groups on a wide range of projects makes us valuable asset not just in designing the project, but getting it approved, as well.







**Primera Terra**

Playa Vista, CA

KB Homes

\* LEED for Homes Platinum \*







KTGY group takes great pride in being on the forefront of the sustainability movement. Far from being simply theoretical, our solutions are buildable. Being green is important to us, but being green while making our buildings profitable for our clients is our goal. We know from our experience that the renter is not necessarily willing to pay more rent for a green building. They however do respond to a tangible benefit where their utility bills may be reduced.

We have designed more than 20 projects that have been **LEED certified**, with several at the gold level and one at the platinum level.

We believe that sustainability is not something that happens at the end of the design process. It starts at the very first lines on the page and continues collaboratively throughout the process until the building is occupied and a users' manual has been supplied to the resident. Typically we suggest a charrette early in the process that includes all consultants who will work on the project. While they might not start working in earnest for several weeks, this is an opportunity for them to add valuable knowledge that can only be incorporated at this early stage. It also sets an expectation level for their work later.

KTGY has dozens of staff members who are LEED AP. Rather than a specialty confined to one studio, or small group of individuals, sustainability permeates our thinking across studios and offices. Further, we have formed strategic alliances with several green building consultancies with whom we collaborate regularly to insure that our thinking remains up-to-date.





Building construction has direct and indirect impacts on the environment. Buildings use resources such as energy, water and raw materials, and they generate waste both during construction/demolition and after they are occupied. Building owners, designers and builders face the unique challenges of meeting the demands of a project while minimizing its impact on the environment.

The KTGy Group values sustainable and “green” building design as our collective responsibility to the environment and future generations. KTGy is committed to design processes based on principles of smart growth and planning that incorporate natural and reusable resources and preserve open space, resulting in efficient and sustainable buildings and communities. Our common-sense design approach respects the natural environment by minimizing waste, efficiently utilizing resources, and creating built environments that promote healthy and enjoyable living.

Our approach to sustainable and integrated building design starts with identifying the overall goals for a given project and their impact on project design, schedule and budget. An evaluation of the appropriate strategies and methods follows to determine the best and most cost effective ways to accomplish these goals. A design team charrette or workshop, including the owner, architect, landscape designer, MEP and civil engineers, and builder, is organized to explore building ideas and planning concepts, sustainability goals and implementation strategy, and to assess the sustainable scope of work for all team members. This charrette focuses on the following sustainable design principles:

- Optimizing the Site / Reuse of Existing Structure
- Optimizing Energy Use
- Protection and Conservation of Water
- Utilization of Environmentally Preferable Products
- Enhancement of Indoor Environmental Quality
- Optimization of Operational and Maintenance Practices

Documentation of the agreed upon design strategies and sustainable features is critical in every phase of the projects development. KTGy monitors progress and documents the incorporation of systems and materials in order to ensure that project goals are met.







KTGY operates with the latest in technology at our fingertips. Starting with design, our process leans heavily on 3-D technology; not simply for presentation graphics, but as an integral design tool. From day one, KTGY's design teams use SketchUp and Revit to fully envision the concept, to make it understandable for our client, and to bring all stakeholders along on the journey. Our goal is to take the "leap of faith" out of the process. We expect our clients to be as committed and passionate about the design as we are. In order to make this happen, it is crucial that everyone involved understands what is proposed and why. 3-D visualization is key.



As the design process moves forward, we employ a host of computer tools to present our ideas in the most flattering ways possible. Depending on the stage of development and the goals, we may employ 3-D perspective hand sketches to photo realistic computer models and video fly-throughs. We have the tools to generate all of this within KTGY, but for most of our clients, our strategic alliances with select consultants and through relationships with our Beijing office are a more cost effective alternative. We work with a small group of some of the best visualization people in the world on a regular basis to insure both quality in the work, but also short time turn-around.



As the project progresses and working drawings are created, KTGY uses both AutoCad and Revit. We are conscious of the other consultants' capabilities and will work out a system that is beneficial to everyone involved. We are diligent about coordination and can use technology to assure a consistent and ultimately buildable set of drawings.



KTGY also uses video conferencing, email, high-speed internet connections, and file sharing systems that allow us to work across studios and five offices across the country and our China office. When a client hires KTGY, they get the best we have to offer, wherever they are located.



## Principal

Having accumulated over 27 years of experience in the industry, David Obitz has been a Principal at KTGy since 2003. His leadership and knowledge has helped his team to design award winning projects that have gained local and national recognition. He is adamant about ensuring that each project has clear direction and communication between all parties including consultants, clients and relevant jurisdictions. By bringing vision and a story to each project, Mr. Obitz lays out a clear road through the many phases of development. He is also responsible for the design integrity from conceptual planning and schematic architecture to construction details on various residential and mixed-use projects throughout California.

## Education

Bachelor of Architecture  
California State Polytechnic University, Pomona

## Mixed-Use

### Lee Homes & CIM

Market Lofts  
Los Angeles, CA

Harbor Lofts  
Anaheim, CA

### Lyon Realty Advisors

West Gateway Mixed-Use  
Long Beach, CA

The Lofts at Promenade  
Long Beach, CA

### EMAAR International

New Istanbul Mixed-Use Lifestyle  
Center  
Istanbul, Turkey

Tinja Core Phase III Mixed-Use and  
Lifestyle Center  
Tinja, Morocco

New Cairo Mixed-Use I & II  
New Cairo, Egypt

## Residential - For Rent

### AMLI Residential

Camarillo Apartments  
Camarillo, CA

### Bridge Housing Corporation

Woodbury Walk Apartments  
Irvine, CA

Pottery Court  
Lake Elsinore, CA

### Irvine Apartment Communities

Portola Place Apartment Homes  
Irvine, CA

UTC Amenities Rehab  
Irvine, CA

### Jamboree Housing

Granite Court Apartments  
Irvine, CA

Doria Apartments  
Irvine, CA

Diamond Apartments (Special Needs)  
Anaheim, CA

### Sobrato Development

Aventino Apartments  
Los Gatos, CA

1270 Campbell  
San Jose, CA

### Essex Property Trust

Epic Apartments  
San Jose, CA

Skyline Rehab  
Santa Ana, CA

## Residential - For Sale

### Lennar

'The Club' at Central Park West  
Irvine, CA

Collage Park PA - 11 & 20  
Chino, CA

The Ridge  
Mission Viejo, CA

Belmont  
San Eliso Hills, CA

### Lewis Operating Corp

The Preserve PA 15 & 16  
Chino, CA

Eastvale Resort  
Eastvale, CA

### Alvarez & Marsal

Doheny Village  
Dana Point, CA

### Shapell Homes

Aldea Master Plan  
Porter Ranch, CA

Mirabel  
Porter Ranch, CA

Ranch House Community Building  
Porter Ranch, CA

### Brandywine Homes

Triangle Point  
Garden Grove, CA

Holder Site  
Buena Park, CA

Bryan Sevy offers a comprehensive understanding of the land development and builder process that is inherent to residential and mixed-use communities. This helps him to excel as a project manager who understands the client's demands, both in the for-sale and rental markets. Bryan is able to address the entire project life span from conceptual planning through construction.

**Education**

Bachelor of Architecture (Magna Cum Laude)  
California Polytechnic State University,  
San Luis Obispo

**Registration**

USGBC LEED Accredited Professional

**Mixed-Use**

**Barratt American**

Red Car Junction  
Monrovia, CA

**Basin Street Properties**

Waterfront Apartments  
Petaluma, CA

Riverfront  
Petaluma, CA

**Brandywine Homes /  
Taylor Woodrow Homes**

Renaissance Plaza  
Stanton, CA

**Douglas Wilson Companies**

Centrepoint  
San Diego, CA

Creekside Vistas  
Chula Vista, CA

**DR Horton**

Brookshire  
Camarillo, CA

Chollas Triangle  
San Diego, CA

**Lennar Communities**

Central Park West  
Irvine, CA

**Haven Homes**

Tapo Street Market Place  
Simi Valley, CA

**Single Family**

**Lewis Operating Co.**

Arboretum  
Fontana, CA

**Stratus Development**

Bloomington Heights  
Rialto, CA

Riverside Lane  
Rialto, CA

**Multi-Family**

**Brandywine Homes /  
Taylor Woodrow Homes**

Beach & Ball  
Stanton, CA

**Fairfield Residential**

Parkview  
San Diego, CA

Providence  
Las Vegas, NV

**Greenlaw Partners**

Triangle Square Renovation  
Costa Mesa, CA

Irvine Technology Center  
Irvine, CA

**Intracorp**

Alicante  
Los Angeles, CA

**KB Home**

Magnolia Lane  
Anaheim, CA

**Lennar Homes**

Camden Place  
Tustin, CA

Echo Park Townhomes  
Los Angeles, CA

Savannah  
Irvine, CA

**Lewis Operating Co.**

Homecoming  
Fairfield, CA

University Village Seniors  
Loma Linda, CA

**Nexus Properties**

Oak Springs  
Wildomar, CA

**Standard Pacific Homes**

Bayberry  
Torrance, CA

**Taylor Woodrow Homes**

Palazzo  
Stanton, CA









**Client**

The Lee Group / CIM Group

**Location**

Los Angeles, CA

**Use**

Mixed-Use  
Apartments, Supermarket & Retail

**Facts**

- Density - 142 DU/AC
- Plans - 800-1,400 SF
- Units - 267 DU
- Retail - 55,000 SF Supermarket
- 6 Retail Suites
- Type I Construction

**Awards**

- 2009 Pillars of the Industry
  - Best Mid-Rise Condominium Community (Finalist)
- 2008 Gold Nugget Awards
  - Best Mixed-Use Project (Grand Award)



**Description**

As a part of the revitalization of Downtown Los Angeles, Market Lofts acts as a catalyst, serving a hungry population. Ideally located in the South Park neighborhood at 9th and Flower, Market Lofts is one of the most desirable loft communities in downtown LA. These chic one and two bedroom lofts with exposed ceilings are located six stories above retail, including the first supermarket in downtown LA since 1950, Ralph's Fresh Fare. Other specialty stores include The Coffee Bean & Tea Leaf, Cold Stone Creamery, Quiznos Subs, the UPS Store and Pastagina. With a forward looking aesthetic, and contemporary loft style floor plans, Market Lofts points toward the future and what will be.





### Client

Lyon Realty Advisors, LLC

### Location

Long Beach, CA

### Use

Mixed-Use

### Facts

- Density - 61 DU/AC
- Plans - 631-1,369 SF
- Retail - 14,200 SF
- Units - 104 DU
- Area - 1.7 AC
- Total Parking (Residential & Public) - 401 Spaces
- Parking in Podium Building (Promenade & 3rd Street) - 15 Public Spaces
- Parking in 7 Level Structure - 386 Spaces (164 Residential + 222 Public)

### Awards

- 2010 Pillars of the Industry
- Best Rental Community Non-Garden 5 Stories or Less (Finalist)
  - Best MF Community Site Plan (Finalist)
- 2010 Multi-Housing News Design Excellence Awards
- Best New Development (Finalist)



### Description

The Lofts at Promenade feature apartment homes with convenient access to all that Long Beach has to offer. In addition to the community's private rooftop lounge with pool, spa and an outdoor fireplace are spacious studios, one and two bedroom apartment homes which make up the 104 units. Over 14,000 sf of retail sit along the new Long Beach Promenade, a pedestrian only thoroughfare that will contain entertainment, restaurant and retail shopping venues. This rich, urban lifestyle is conveniently located near all that downtown Long Beach is known for. The Lofts at Promenade is bounded by 3rd Street to the north, Long Beach Blvd to the east, Broadway to the south, and The Promenade North to the west.







**Client**  
Crimson Partners

**Location**  
Arlington, VA

**Use**  
Mixed-Use Apartments

- Facts**
- Density - 196.4 DU/AC
  - Units - 165 DU
  - Area - .84 AC
  - Net Rentable - 117,447 SF
  - Avg. Unit Size - 712 SF



**Description**

Located on the edge of the bustling Ballston Corridor neighborhood, the 650 N. Glebe Rd. project provides workforce housing that is walking distance from major retail and commercial centers, a metro stop, and on the same block as a grocery store. Its architectural aesthetic takes cues from its context in terms of materials and colors, but does not try to replicate any historical style precedents instead it merely follows a rational expression of its function. The building hugs the street edge in an L-shaped configuration following the geometry of the site which shelters a small internal courtyard for its residents. Leasing and amenity spaces are naturally lit by floor-to-ceiling glazing in their double-height volume at the corner, while mezzanine units wrap the remaining perimeter of the ground floor with 5 levels of stacked flats above. All parking is provided in 2 subterranean parking levels.







**Client**

Lyon Realty Advisors, Inc.

**Location**

Long Beach, CA

**Use**

Urban Mixed-Use Development

**Facts**

- Density - 75 DU/AC
- Plans - 650-1,070 SF
- Units - 291 DU
- Area - 3.54 AC
- Retail - 16,000 SF

**Awards**

- 2011 Gold Nugget Awards
- Mixed-Use Project (Merit)



**Description**

Gallery421 is a high density, mixed-use infill development adjacent to City Hall in Downtown Long Beach, one of Southern California’s most unique waterfront urban destinations to live, work, and play. The project’s 291 rental units are within walking distance of retail, restaurants, entertainment venues, offices and transit. Approximately 16,000 SF of retail line the edges of Magnolia Avenue and Broadway, while townhomes wrap the remaining sides of Chestnut and 3rd Street. In addition to its luxury unit interiors are a business and conference center with Wi-Fi, HDTV and teleconferencing, billiards room, card room, a dog-grooming room, an on-site art gallery, a coffee bar, a yoga and Pilates studio, a private movie theatre, a game room with Wii™, a fitness center and an exterior TV wall. Gallery421 also includes open spaces, a resort-style pool and spa, barbecue grills, private balconies, concierge services, outdoor seating with a TV and bar area plus fireplace areas with sea of amenities such as fitness room, movie theater, yoga studio, pool, spa and barbeque areas.





**Client**  
Carmel Partners

**Location**  
Sunnyvale, CA

**Use**  
Mixed-Use Apartments

- Facts**
- Density – 83.6 DU/A C
  - Plans – 696-1,473 SF
  - Units – 133 DU
  - Area – 1.59 AC
  - Parking – 235 Stalls



**Description**

Carmel Lofts is a hip, new, contemporary mixed-use development spanning two blocks adjacent the Plaza del Sol, off of South Frances Street and Olson Way. Carmel Lofts will consist of two podium buildings comprised of up to four stories of residential with 133 loft-style apartment homes and more than 8,000 square feet of ground floor retail space. Carmel Lofts features 1 and 2 bedroom open floorplans with 10’ ceilings, floor to ceiling windows, balcony, sliding doors and all the many modern and sustainable features that make this mixed-use community cutting edge for today’s tech savvy professional. Offering a 24/7 live/work/play/shop/dine lifestyle in the amenity-rich, pedestrian-oriented environment of downtown Sunnyvale, residents are just a short walk to the Caltrain Station.







**Client**

The Lee Group / CIM Group

**Location**

Anaheim, CA

**Use**

Mixed-Use Apartments

**Facts**

- Density - 45 DU/AC
- Plans - 770-1,554 SF
- Units - 129 DU
- Construction Type V 1HR over Type 1



**Description**

Harbor Lofts is a mixed-use building at the intersection of Harbor Boulevard and Lincoln Avenue in the heart of downtown Anaheim. Envisioned as a gateway to the downtown redevelopment masterplan on one side, the other side shares a curvilinear plaza with Frank Gehry's Anaheim Ice building effectively framing the fluid forms of that building. Open loft unit plans are organized around a central amenity courtyard with pool deck and even the double-loaded corridors are pulled apart to allow natural light and breezes to stream into them. The architectural aesthetic takes cues from its context in terms of colors, form, and materials.





### Client

Essex Property Trust, Inc.

### Location

Sunnyvale, CA

### Use

Mixed-Use T.O.D.

### Facts

- Density - 44 DU/AC
- Plans - 694-1,313 SF
- Units - 284 DU
- Area - 6.455 AC
- Type V Construction (357,856 SF) over two levels of Type I parking/retail structure (221,167 SF)
- At-Grade Retail (34,821 SF)
- Free Standing Fresh & Easy Grocery Store (14,107 SF)

### Awards

2012 NAHB Pillars of the Industry Awards

- Award Finalist

2012 Gold Nugget Awards

- Grand Award & Award Finalist



### Description

Via provides an upscale/suburban, mixed-use T.O.D. environment that has four levels of luxury living over one level of retail. Retail parking is at grade and one level of subterranean parking is underneath. There is +/- 46,000 SF of retail space that includes a Fresh & Easy grocery store, bank, restaurant, deli and other neighborhood-serving retail. Amenities for residents include a luxury pool, spa, wireless internet, cyber cafe, fitness center, resident clubroom, bocce ball court, putting green, BBQ area and firepits, Zen-styled courtyards and a dog walk. Via is located in the heart of Silicon Valley between two major freeways, adjacent to light rail and near San Jose Airport.









tentive Studio of educated and experienced Landscape Architects and Planners located in Newport Beach, CA. Our current projects are focused in Orange, Los Angeles, and Ventura Counties in Southern California with other projects in the Sacramento-region and East Bay in Northern California. **MJS** is committed to providing the highest level of professional Landscape Architectural and Planning design services in developing viable solutions for the enhancement of life, while understanding, respecting and preserving the environment. The diverse and experienced studio values the opportunity to create purposeful and enjoyable outdoor interaction for all users to embrace.

**MJS**Design Group is an 'S' Corp., incorporated in the state of California on May 21, 1999. **MJS** is directed by its principals Mark Schattinger, ASLA President and Matthew Jackson, ASLA Vice President.

**MJS**Design Group  
A Landscape Architectural Studio  
507 30th Street  
Newport Beach, CA 92663  
949.675.9964







ANAVIA anaheim, CA







ASCENTwarner center







AVALON VILLAGE Irvine

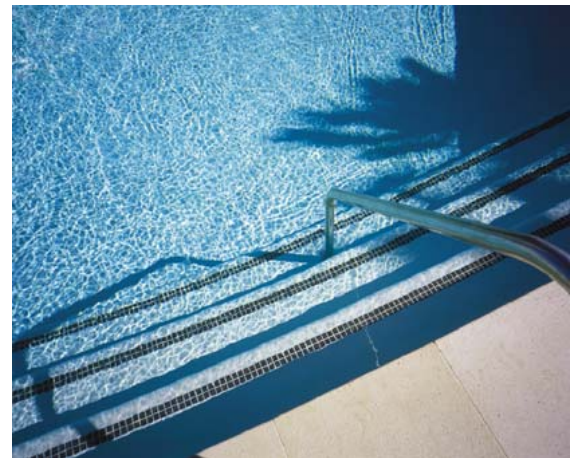




AXIS 2300irvine







AZZURRA marina del rey







DANA STRAND los angeles







FORTY 55 los angeles 



PRIMERA TERRAplaya vista







SOHO SQUARE los angeles





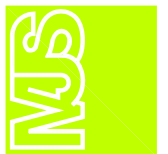


SOUTH BREA LOFTS **bre** 





VIVEREanaheim, CA



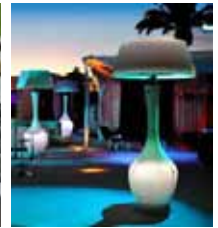




HIGHLAND hollywood







MATSU 'A' Los Angeles



# Bettencourt & Associates

## **PHILIP BETTENCOURT**

14 Corporate Plaza, S. 120  
Newport Beach, California 92660-6907  
949-720-0970

[Philip@bettencourtplans.com](mailto:Philip@bettencourtplans.com)

Philip Bettencourt is an independent real estate planner and public affairs consultant providing land development, stewardship, disposition and analysis as well as governmental entitlement to use services for Southern California property clients including institutional clients. He is also the former chairman of the board and president of Rossmoor Partners, L P and Cortese Properties, Inc., the world famous Leisure World retirement communities' development successor where he processed a \$2-million land sale to the City of Laguna Woods through the California Coastal Conservancy, as well as facilitating the acquisition of the bulk of the land acquired for Aliso Viejo Country Club.

Philip has participated as a due diligence and feasibility analyst for more than \$500 million in closed land transactions including purchase of the Mission Viejo Company, Akins Development Company, Laguna Niguel Development Inc., Cannery Village LLC, BRE South and South Brea Lofts.

His more than three decades of experience in real estate planning and public affairs includes executive positions with Coleman Homes, Akins Development Company, Texaco-Anaheim Hills, Inc., and The Irvine Company. In addition, he is the former interim city manager and real property manager for the City of Newport Beach including stewardship responsibilities for the City's substantial land leases at the Balboa Bay Club, Beacon Bay, Marina Park and the City's oil well leases.

Philip also served as a co-founder of Bridge Action Team 76 (BAT-76) the citizen action group in Newport Beach headed by noted yachtsman Bill Ficker that negotiated with environmental and boating interests to right size the Upper Bay Bridge with Caltrans and other regulatory agencies.

His private and institutional clients have included Beazer Homes, Standard Pacific of Orange County, Brookfield Homes Southland, Inc. The Irvine Company, Fieldstone Communities, Inc., the Lutheran Church-Missouri Synod, the Diocese of Orange Roman Catholic Church and St. Andrews Presbyterian Church, Newport Beach and most recently Newport Banning Ranch LLC.

He is a public administration graduate of California State University at Long Beach. For five years Philip served as a member of the Extension Division faculty in the Housing and Light Construction program at the University of California, Irvine.

He is a former director of the National Association of Home Builders, and is past chairman of the board of the Newport Beach Chamber of Commerce. Philip is a former director of the City of Irvine Transportation Authority, a member of the City of Anaheim Hill and Canyon Municipal Advisory Council, a member of the Newport Beach City Council Ad Hoc Economic Development Committee and General Plan Advisory Committee. He is a former member of the Restoration Advisory Board for the U.S. Naval Weapons Station, Seal Beach. Philip is a past president of the 1,645 home Newport Coast Community Association and six other home owner associations in California and Utah. He was recently appointed as one of three trustees for the newly formed Newport Banning Land Trust, a candidate stewardship entity for more than 200 acres of Newport Banning Ranch open space.



**City Hall Reuse Project**  
**Response to Request for Qualifications**  
**AMLI Residential – Costa Mesa**  
**Bettencourt and Associates - Sub consultant**  
**November 20, 2012**

**Professional Experience.** Philip Bettencourt of Bettencourt and Associates is a Newport Beach based land use and public affairs consultancy with substantial experience with Newport Beach land use matters and civic affairs as well as work in other jurisdictions. Bettencourt’s Newport Beach experience includes:

- Former interim city manager and real property manager
- Newport Beach Economic Development Committee, former member
- Newport Beach General Plan Advisory Committee, former member
- Santa Ana River Trails Blue Ribbon Committee, member

In addition to governmental affiliations Bettencourt’s civic experience includes:

- Newport Coast Community Association, president two terms
- Bayridge Community Association, president two terms
- Newport Beach Chamber of Commerce, chairman of the board
- Newport Beach Board of Realtors, member
- West Newport Beach Association, member
- Friends of Harbors Beaches and Parks, member
- Newport Banning Land Trust, director and secretary
- Corona del Mar Residents Association, member
- Restoration Advisory Board, U S Naval Weapons Station, Seal Beach, member

This civic involvement is important in building trust and confidence with local stakeholders in working on matters of mutual interest for mutual benefit.

**Professional Experience.**

Bettencourt’s professional experience in Newport Beach and throughout Orange County includes the participation in, entitlement and public affairs involvement for leading property developers and institutional clients including:

- **Newport Banning Ranch LLC**
- **Irvine Community Developers**
- **MacMillan Communities**
- **CWI Development, Inc.**

- **Dioceses of Orange, Roman Catholic Church**
- **Saint Andrews Presbyterian Church**
- **Brookfield Communities**
- **Standard Pacific of Orange County**
- **Concordia University, Irvine**

**Processional Services Provided.** Bettencourt’s provision of professional services to these land development and institutional property clients includes but is not limited to:

- Outreach interviews of key community stakeholders to determine points of view and options regarding proposed uses and community needs
- Development of sophisticated data bases of advocates, stakeholders and agency official to facilitate consensus building
- Analysis of governmental regulations to develop standards and conditions for an approvable project
- Preparation of risk forecasts and processing schedules to evaluate necessary time to complete project requirements
- Peer group interviews of interested consultants to determine qualifications for proposed assignments
- Community presentations and outreach to present client’s proposal(s) to community leaders and other stakeholders

**References:**

- Mike Mohler, Brooks Street, Newport Beach
- George Basye, Aera Energy, Brea
- Kevin Weeda, CWI Development, Inc., Newport Beach
- Dan Miller, The Irvine Company
- Jake Easton, St. Andrews Presbyterian Church
- John Flynn & John Erskine, Nossaman, LLP

**Entitlement.**

The City of Newport Beach has set forth the existing governmental requirements for use of the property as well as likely California Coastal commission requirements since, while the city has a Certified Local Coastal Plan it does not have an approved Implementing action Plan at this time. The upper end of unit opportunities is limited by constraints of the General Plan, environmental conditions and “Greenlight” ordinance constraints. The client –proposer respects these constraints and has prepared a competitive proposal with these limitations and opportunities in mind.

Even though the property owner is also the essential land use regulator, the city of Newport Beach must still respect community sensibilities in selecting a developer and project proposal. Recent community meetings have demonstrated some community concerns about luxury apartment projects and this opposition must be contained if a successful project is to be implemented. In that regard,

Bettencourt and Associates would conduct community outreach and fact gathering to develop confidence and trust in the proposed project.

**Business Activities**

- Bettencourt and Associates has no reportable business activities for Attachment B, Statement of Disclosure
- Bettencourt and Associates has no reportable business activities with City officials in the last five (5) years that would be reportable for Attachment B, Statement of Disclosure.



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**AMLI Residential Partners, LLC**

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**1. City of Orange**

Anna Pehoushek  
Principal Planner  
apehoushek@cityoforange.org  
(714) 744-7228  
www.cityoforange.org

**2. City of Camarillo**

Bob Burrow  
Director, Community Development  
bburrow@ci.camarillo.ca.us  
(805) 388-5361  
(805) 388-5388 fax  
www.ci.camarillo.ca.us

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**KTGY Group, Inc.**

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**1. The Lee Group**

475 Washington Blvd.  
Ste. 201  
Marina Del Rey, CA 90292  
(310) 827-0171  
Jeff Lee

**2. Related California**

180 Newport Center Drive  
Newport Beach, CA 92660  
949.720.8181  
Gino Canori

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**MJS Design Group**

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**1. Avalon Bay Communities, Inc.**

4440 Von Karman Avenue,  
Suite 300  
Newport Beach, CA 92660  
Mr. Chris Payne

**2. Equity Residential**

26880 Aliso Viejo Parkway,  
Suite 200  
Aliso Viejo, CA 92656  
Mr. Dustin Smith

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**Bettencourt & Associates**

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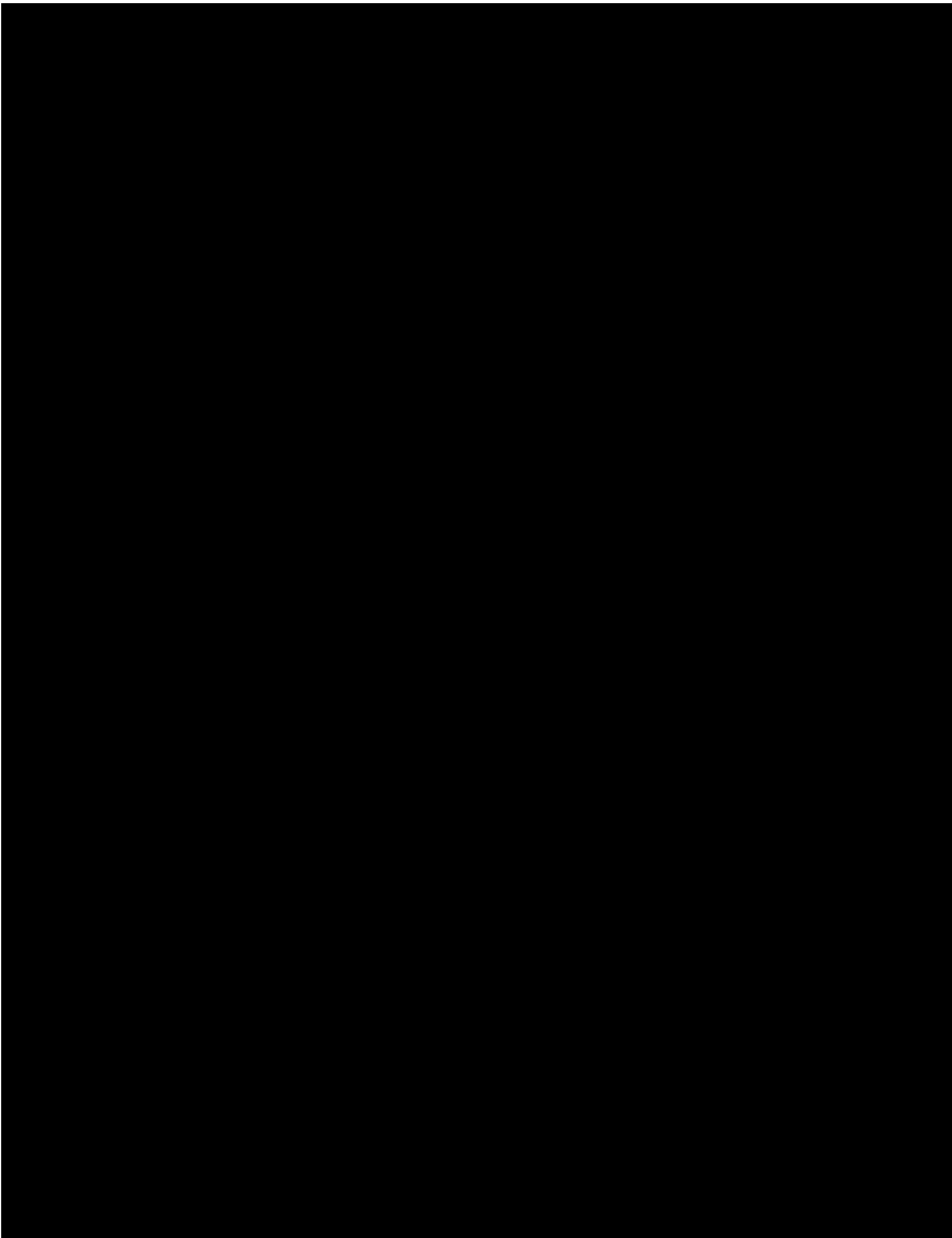
**1. Brooks Street**

Mike Mohler  
Newport Beach, CA

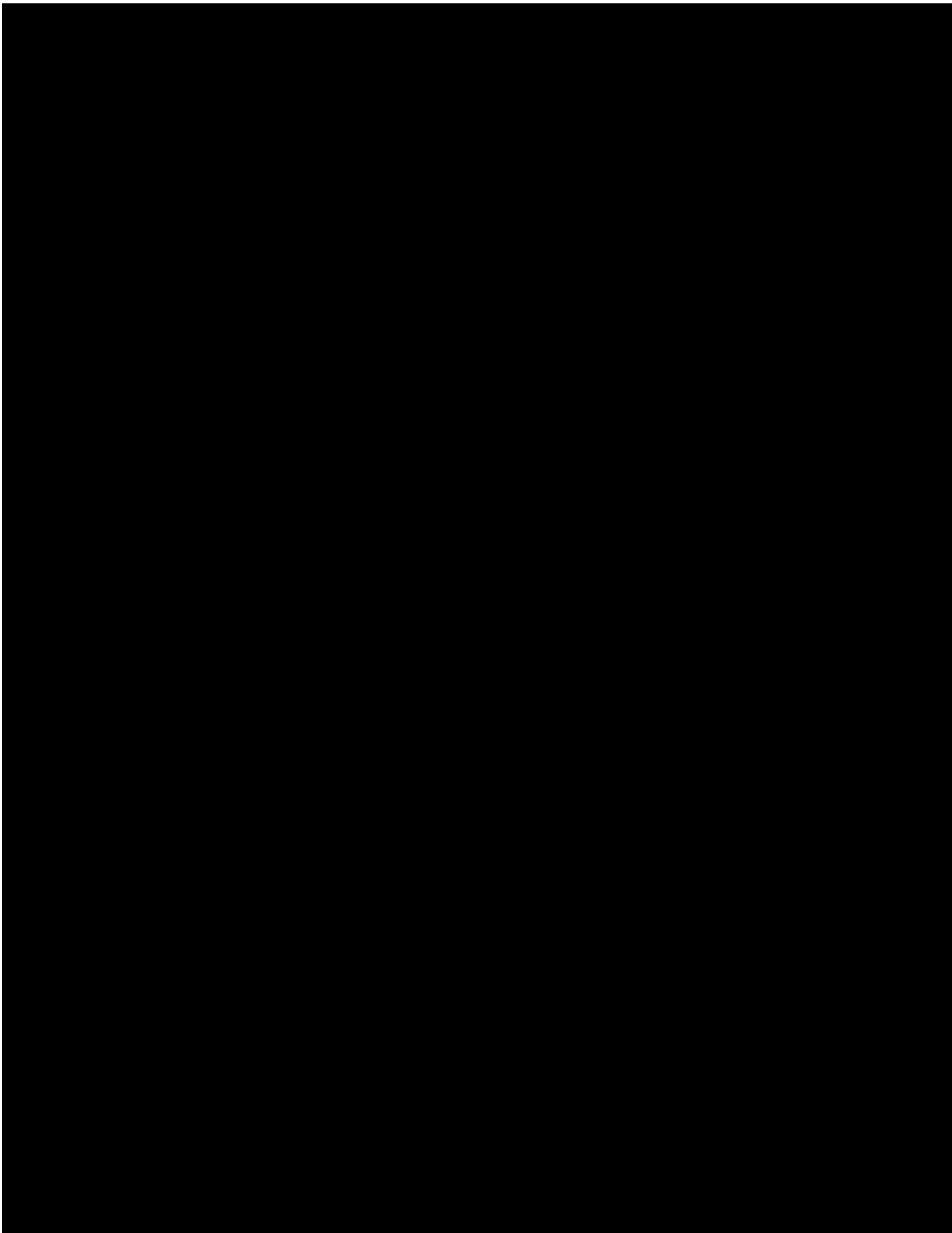
**2. Aera Energy**

George Basye  
Brea, CA











### **Development Strategy**

AMLI Residential Partners, LLC (AMLI) has a history of successfully managing and completing complicated urban infill projects. Furthermore, our development team collectively and independently has proven experience tailored to this site. From high-rise towers in Tokyo and Chicago to the first supermarket in downtown Los Angeles in fifty years, to mixed-use projects around Los Angeles and Orange Counties our team knows that the key to our success is a deep understanding of place. That understanding extends beyond simply the physical context. Our team includes KTGy and MJS who together with AMLI have collaborated on a ground lease residential community in Camarillo, CA and has a proven working and creative professional relationship.

The history of the site, the neighborhood dynamic, as well as community leaders all contribute to the end result. AMLI and our design team embrace this collaboration. We realize that more minds thinking together are better than one alone. In collaboration with the City of Newport Beach official City family and neighborhood stakeholders our team will develop a detailed vision for a high-end luxury for rent community where retail shops and public space are focal at the ground level, then articulate that in a manner that the community is able to identify with this vision. With quality architecture and successful public spaces at the front of our design, our development strategy will focus on forging relationships within the city and community to create a new mixed-use community that enhance the City of Newport Beach.

### **Public/Private Relationship**

AMLI understands a successful public/private working relationship will need to be established with the City of Newport Beach. This relationship will govern not only the terms of the ground lease, but drive the ultimate design and use of the site. Additionally, strong public/private partnerships will be necessary to garner support of the California Coastal Commission. Past successful public/private ventures that our team has been involved in includes a joint venture with the City of Austin, Texas where AMLI was the developer, builder and property manager of an 18-story, 231-unit apartment tower over 160,000 square feet of retail all on city-owned land. Another example of past public/private experience is with the City of Anaheim where KTGy was the lead planning and design firm for the Anaheim Regional Transit Intermodal Center (ARTIC).

### **Public Outreach**

The leadership of this development strategy is an art form that we take very seriously. On that note we have retained the local expertise and advisement through Bettencourt and Associates that we trust will strengthen our development footing as a serious development team committed to forging local neighborhood relationships. From neighborhood charettes and meetings to formal commission and council hearings, we will work to form a collective goal that all stakeholders can embrace. We really do believe that the right design can make a difference.

Even though the property owner is also the essential land use regulator, the city of Newport Beach must still respect community sensibilities in selecting a developer and project proposal. Recent community meetings have demonstrated some community concerns about luxury apartment projects and this opposition must be contained if a successful project is to be implemented. In that regard, Bettencourt and Associates will work with our team to conduct community outreach and fact gathering to develop confidence and trust in the proposed project.

Each project and site is different and each requires a different strategy and approach. We are willing to be as involved as necessary in the process. We think our years of experience dealing with diverse community groups on a wide range of projects makes us a valuable asset not just in designing the project, but getting it approved, as well.



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## **Design Process for High Performance Urban Residential**

We believe it takes more than great ideas to design great places. It takes great people. Our team of designers, including KTGy and MJS (a local landscape architectural firm located on 30th Street in Newport Beach), has the talent, creativity and dedication to exceptional service to deliver successful architectural and planning solutions. A design is only successful as long as a community believes and supports it. To this end, through our public outreach and partnership with the City of Newport Beach, our team will endeavor to include and incorporate public opinion, community needs and smart design into the site layout and architecture. Essentially, from concept design through construction drawings our team will work to include the City and community at all points throughout the creative design process.

Proof of our team's ability to not only design but functionally operate successful and profitable urban residential community can be found within this submittal. Since the early 80's this team individually has been designing and developing urban residential communities, many with mixed-uses, and some of these communities are highlighted in this submittal.

## **Sustainability Experience**

AMLI, KTGy and MJS all take great pride in being on the forefront of the sustainability movement. Far from being simply theoretical, our solutions are buildable. Being green is important to us, but being green while making our buildings profitable for our clients is our goal. We know from our experience that the renter is not necessarily willing to pay more rent for a green building. They however do respond to a tangible benefit where their utility bills may be reduced.

Combined, our team has designed and developed more than 30 projects that have been LEED certified, with several at the gold level and one at the platinum level. We believe that sustainability is not something that happens at the end of the design process. It starts at the very first lines on the page and continues collaboratively throughout the process until the building is occupied and a users' manual has been supplied to the resident. Typically we suggest a charrette early in the process that includes all consultants who will work on the project. While they might not start working in earnest for several weeks, this is an opportunity for them to add valuable knowledge that can only be incorporated at this early stage. It also sets an expectation level for their work later.

Our approach to sustainable and integrated building design starts with identifying the overall goals for a given project and their impact on project design, schedule and budget. An evaluation of the appropriate strategies and methods follows to determine the best and most cost effective ways to accomplish these goals. A design team charrette or workshop, including the owner, architect, landscape designer, MEP and civil engineers, and builder, is organized to explore building ideas and planning concepts, sustainability goals and implementation strategy, and to assess the sustainable scope of work for all team members. This charrette focuses on the following sustainable design principles:

- Optimizing the Site
- Optimizing Energy Use
- Protection and Conservation of Water
- Utilization of Environmentally Preferable Products
- Incorporate water quality best management practices (BMP)
- Compliance with City of Newport Beach General Plan and Local Coastal Plan
- Enhancement of Indoor Environmental Quality
- Optimization of Operational and Maintenance Practices

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### **Catalyst/Gateway Projects**

A few of our team's premier projects are worth noting here that showcase our collective ability to design, build and operate successful urban residential communities. They include:

- **City of Glendale and AMLI – AMLI Lex on Orange:** A 310 unit urban infill community in the heart of Glendale, CA. A residential community bringing life back into a blighted area of downtown.
- **City of Austin and AMLI - AMLI on 2nd:** a 231 unit urban infill public/private partnership with the City of Austin, Texas. Includes over 160,000 square feet of retail managed by AMLI Residential all on city-owned real estate in the center of downtown Austin.
- **Lee Group and KTG - The Market Lofts:** A City of Los Angeles Community Redevelopment Agency project bringing Ralph's Grocery Market back to Downtown after 50 year absence and providing new housing ownership in Downtown.
- **City of Anaheim and KTG - Anaheim Regional Transit Intermodal Center (ARTIC):** A Public/Private joint venture and KTG as the lead Planning firm and Design Advisor.





**AMLI typically develops using “all-cash” which would be the proposed financing approach for the redevelopment of the Newport Civic Center. AMLI never conditions a deal on third party debt or equity financing; this is one of the major benefits having a dedicated capital source through ownership by PRIME Property Fund.**



Bettencourt  
& Associates





Asset Overview



Property Description

Address	201 Lavaca St., Austin, TX 78701
Property Type	7-story concrete slab-on-grade mid-rise
Site Size	+/- 1.8 acres (122 du per acre)
Classification	Improvements: A / Location: A
Year Built	2005
Developer	AMLI
Rentable SF	218,378
Retail SF	41,567
Total Units	220
Average Unit Size	993
Number of Buildings	1
Apartment Parking	Parking deck with a total of 280 spaces (1.3 spaces/unit)
Unit Mix Overview	85% 1-BR & 15% 2-BR





## Property Description

### Community Amenities

- Center courtyard w/ resort-style pool
- State-of-the-art fitness center
- Business center & conference room
- Resident lounge
- Bike lockers
- Located one block from Warehouse District
- Located one block from Lady Bird Lake Hike & Bike Trail

### Interior Finishes

- 10' ceilings
- City & District views\*
- Scored concrete flooring
- Washer & dryers
- Urban light fixtures & recessed lighting
- Formica countertops w/ ceramic backsplashes
- Maple & mahogany cabinets
- Black contemporary appliances
- Dual vanities\*
- Garden tubs
- Sunrooms\*

\* Select units



Asset Overview



Property Description

Address	1620 E. Riverside Dr., Austin, TX 78741
Property Type	4-story wood framed mid-rise
Site Size	+/- 10.86 acres (35 du per acre)
Classification	Improvements: A / Location: A
Year Built	2010
Developer	AMLI
Rentable SF	322,551
Retail SF	15,396
Total Units	375
Average Unit Size	887
Number of Buildings	2
Apartment Parking	4-story parking garage w/ a total of 638 spaces (0.98 spaces/unit)
Unit Mix Overview	67% 1-BR & 33% 2-BR





Asset Overview



Property Description

- Community Amenities
- Two courtyard swimming pools
  - Rooftop deck overlooking Lady Bird Lake
  - Fitness center
  - Social hub, Cyber zone & Java stop
  - Conference Room
  - On-site laundry facilities
  - Direct lake access & boat docks
  - Hike & bike trail
  - 5 minutes to Downtown
  - UT shuttle & Cap Metro stop on-site

- Interior Finishes
- 9' ceilings
  - Scenic downtown & Lady Bird Lake views\*
  - Faux wood flooring
  - Urban illumination package
  - Full-size washer & dryers\*
  - Chocolate cabinets w/ light Kalahari countertops\*
  - Honey cabinets w/ western iron countertops\*
  - Stainless steel appliances
  - Five-panel doors & ceiling fans
  - Walk-in closets
  - Private patios & balconies
  - Private yards\*

\* Select units

**Property Description**

Address	2717 Howell St., Dallas, TX 75204
Property Type	4-story stick building over concrete podium mid-rise
Site Size	+/- 2.5 acres (88 du per acre)
Classification	Improvements: A / Location: A
Year Built	2007
Developer	AMLI
Rentable SF	202,378
Retail SF	8,371
Total Units	220
Average Unit Size	920
Number of Buildings	1
Apartment Parking	3-level parking garage, 2 levels are below-grade for a total of 503 spaces, 323 are for residential use (1.5 spaces/unit)
Unit Mix Overview	73% 1-BR & 27% 2-BR



Asset Overview



Property Description

Community Amenities

- Cooling spa w/ fountains
- Outdoor entertainment kitchen
- Rooftop deck w/ downtown view
- Fitness zone
- Cyber center & java bar
- Pet washing station
- Private resident parking in gated garage

Interior Finishes

- 9'-11' ceilings\*
- Downtown views\*
- Faux wood flooring
- Washer & dryers
- Wood cabinets & stainless steel refrigerator
- Laminate counters
- Track lighting
- Walk-in closets

\* Select units





**Property Description**

Development Concept

**Units:** 304 units

**Product Type:** Podium style product - 5-story wood frame construction over concrete podium over 2 levels of below grade parking

**Site Size:** 1.64 acres

**Retail:** 12,000 square feet

**Unit Mix:** 19% studios / 62% 1bd/1ba, 19% 2bd/2ba

**Avg Unit Size:** 750 SF

**Apt Parking:** 359 stalls (1.18 spaces per unit / 1 space per bdrm.)

**Community Amenities:** Targeting LEED Silver, Leasing center with SMART office, fitness center, business center, resident lounge, landscaped rooftop deck with clubroom, landscaped courtyard, pet-park and pet-spa, dedicated bike storage and bike repair room

**Interior Finishes:** 9' ceilings, granite or quartz countertops, stainless steel appliances, roller shades, faux wood plank flooring





**Client**

KB Home

**Location**

Playa Vista, CA

**Use**

Market Rate Condominiums

**Facts**

- Density - 44.4 DU/AC
- Area - 1.17 AC
- Plans - 965-1,504 SF
- Units - 52 DU
- LEED for Homes Platinum



**Parking**

- Required - 117 Stalls
- Provided - 117 Stalls

**Awards**

- 2012 NAHB-BALA Awards
  - Neighborhood Design (Platinum Award)
- 2011 SoCal Awards
  - Green Community of the Year (Winner)
  - Best Outdoor Living Space (Finalist)
- 2011 USGBC
  - LEED for Homes Award, MF Category (Winner)
- 2011 ENR California
  - Best MF Residential Project (Winner)



**Description**

Primera Terra is a LEED Platinum Certified residential community that is located at the eastern most portion of Phase I in the greater Playa Vista community. Primera Terra was a redesign to reposition this infill property to address today's challenging economic climate, reducing construction costs while increasing marketability of smaller home sizes. KTGy created a design solution for 52 luxury condominium homes built atop an existing subterranean garage, going from 4 and 5 stories down to 3 stories, without losing units or total bedrooms and minimizing new slab penetrations. Incorporating a wood floor system at the ground floor allowed existing slab penetrations to remain without introducing new ones and shop fabricating the walls and floor trusses streamlined construction. The neighborhood design organizes homes around a central courtyard that provides intimate 'outdoor rooms' for residents to relax and reflect. The courtyard features a linear fountain with stainless steel scupper, an outdoor dining room with barbeques, a conversation terrace with an outdoor fireplace as well as access to a common bicycle storage room. Also featured is a community vegetable and fruit garden for residents to utilize. A 'Living Green Wall' is incorporated to provide an emphasis to the landscape and an identity to the neighborhood. The 3-story building relates well with surrounding neighborhood, providing private patios to activate public streets and articulated facades to create a strong urban edge.







**Client**

Sares-Regis Group

**Location**

Anaheim, CA

**Use**

Transit Oriented Development,  
Type V construction over  
Type I garage

**Facts**

- Density - 60 DU/AC
- Plans - 639-1421 SF
- Units - 312 DU
- LEED Gold Certified



**Awards**

- 2011 Gold Nugget Awards
- Green/Sustainable Community (Merit)
- 2010 Pillars of the Industry
- Best Rental Community (Finalist)
- Best Clubhouse in a MF Community (Finalist)

**Description**

The Crossing development is a LEED Gold transit-oriented development in Anaheim, a city dominated by the automobile. Located by the Anaheim Metrolink and Amtrak train stop and close to shopping, dining and entertainment venues, the project is a conversion of industrial land to luxury rental apartments and live/work units. To mitigate the noise of the trains passing by, great care was taken to orient units to private courtyards within the buildings. These courtyard spaces act as the social heart of the project, joining with the spacious club room, fitness center/spa, and leasing areas to create an exciting, hip, and sophisticated environment. Featuring contemporary urban architecture, resort-style amenities, and an eco-friendly design and construction.





## Client

Smith Jones Partners

## Location

Broomfield, CO

## Use

Market Rate Apartments

## Facts

- Area - 6.68 AC
- Density - 40.72 DU/AC
- Units - 272 DU
  - Studios - 18 DU
  - 1 Bd/ 1 Ba - 149 DU
  - 2 Bd/ 2 Ba - 105 DU
- Clubhouse - 4,400 SF

## Parking

- Garage - 151 garages
  - On Site - 133 stalls
  - Street - 158 street spaces
- 442 stalls (1.62sp/unit)



## Description

A transit-oriented community located midway between Denver and Boulder, this exciting \$21.1 million urban apartment community is designed to fit seamlessly into the pedestrian-friendly, mixed-use nature of the Arista neighborhood and further enhance Arista's already unique living experience. Featuring eight 3-story buildings, Arista Uptown Apartments offers residents a modern blend of urban living centered on a vibrant mixed-use, entertainment-anchored lifestyle with convenient access to public transit, walkable retail, 1stBank Center, an loft Hotel, multiple parks, office and proximity to the Boulder Turnpike's employment centers. The well-appointed apartments feature beautiful contemporary finishes, balconies/terraces, mountain views, tuck-under garages, plus a community clubhouse and fitness center, along with an 11,000 ft. amenity deck containing a pool, spa, barbecue grills and a 1.5-acre private lawn that includes an off-leash dog area.







**Client**  
Hanover Pacific, LLC

**Location**  
La Verne, CA

**Use**  
Mixed-Use  
Student Housing Above Bookstore

- Facts**
- Total Building Plan - 101,087 SF
  - Bookstore/Retail - 8,260 SF
  - Units - 67 DU
  - Beds - 380



## Description

The site is a former parking lot on the university campus. Our project serves as a gateway piece for the campus as well as downtown. We currently have 68 units/378 beds of student housing. The majority of the units are 4 bedroom units serving 6 students. The layout includes a combination of single and double occupancy bedrooms and a living space. Students living here will be expected to take part in the university food services and as a result, kitchens are not provided in any of the plans except R.A. units. There is also +/-8,000 sf of bookstore/retail space that stretches along "D" Street.

The architecture takes cues from downtown La Verne and relies on the bookstore to serve as a continuation of the retail street frontage found further down "D" Street. The pedestrian plaza space at the corner of "D" Street and 2nd Street will help activate the campus edge and serve as a gateway marker for the university. Internal to the site, there is a large resident courtyard that will serve student activities and be a backdoor entrance for students coming from parking.







### Client

Foursquare Senior Living -  
Portland LLC

### Location

Portland, OR

### Use

Mixed-Use Senior Living

### Facts

- Density - 164 DU/AC
- Plans - 547-847 SF
- Units - 132 DU

### Building Summary

- Retail - 6,295 SF
- Lobby - 4,109 SF
- Garage - 38,912 SF
- Community - 4,869 SF

### Open Space

- Courtyard - 4,272 SF
- Roof Terrace - 7,580 SF

### Awards

2012 NAHB-BALA Awards  
• Platinum Award

2012 NAHB-Best of 50+ Housing  
Awards  
• Gold Award

2011 Gold Nugget Awards  
• Award of Merit

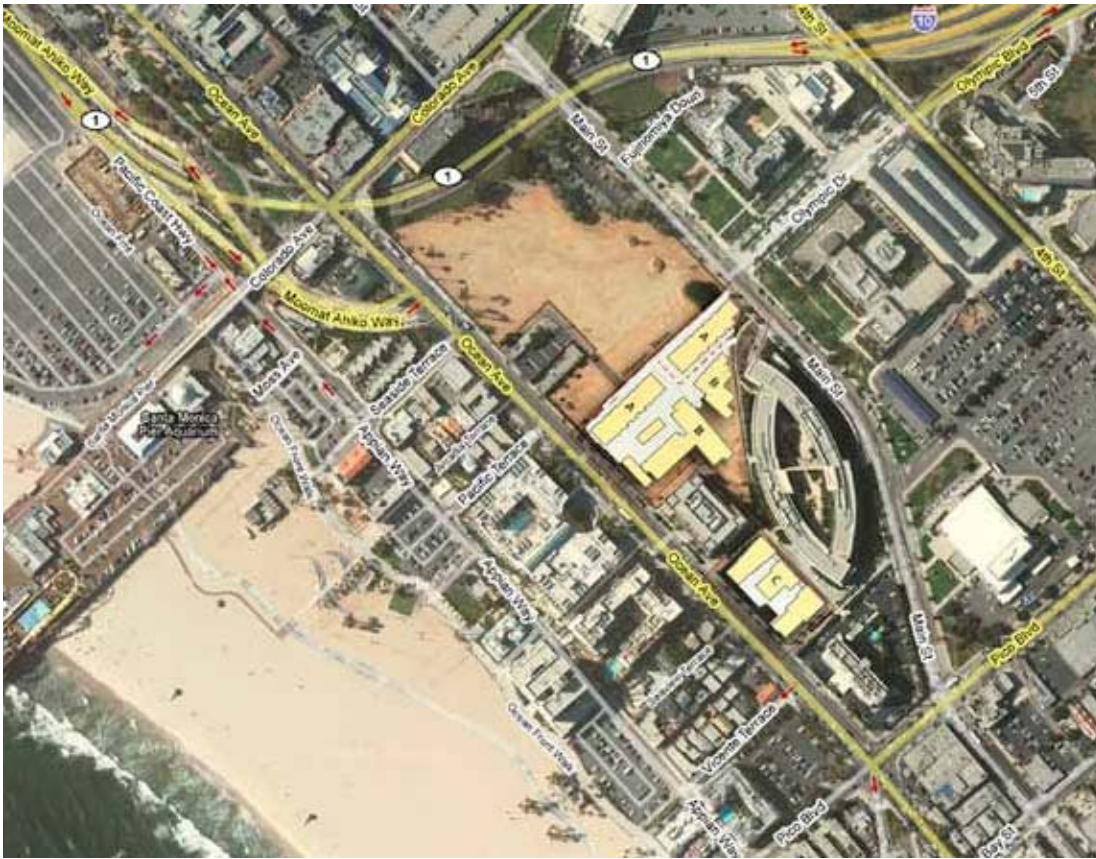


### Description

Situated near downtown Portland, this 132 unit pedestrian friendly senior community introduces stylish urban living with a mixed use component. The architecture is distinctly contemporary with simple lines and a well dressed palette of materials. Residents are treated to a 4,869 square foot recreational center along with a hobby, craft and fitness area across the hall. Carefully executed common open spaces are a breath of fresh air as well as the roof top terrace that residents can enjoy.







**Client**

The Related Companies

**Location**

Santa Monica, CA

**Use**

Podium

**Site 'A' \***

**Facts**

- Density - 77.3 DU/AC
- Plans - 900 – 3,000 SF
- Retail - 10, 000 SF
- Units - 65 DU

**Site 'B' \***

**Facts**

- Density - 83 DU/AC
- Units - 160 DU

**Site 'C' \***

**Facts**

- Density - 100 DU/AC
- Plans - 800 – 3,115 SF
- Units - 98 DU

**Awards**

2011 Los Angeles Business Council (LABC) - Los Angeles Architectural Awards

- Design Concept -MF Market Rate (Award of Excellence)



**Description**

**Site 'A'** - A 6-story contemporary mixed-use design in Type I construction with 3 levels of subterranean parking located near Santa Monica's well-recognized 3rd Street Promenade. Units consist of 1 bed / 1 bath to 3 bed + den / 5 bath.

**Site 'B'** - A 6-story affordable multi-family dwelling with live-work studios and 1-3 bedroom units in Type 1, Type II and Type V construction.

**Site 'C'** - A mixed-use design with 10-stories above grade and 4 below in Type 1-A construction consisting of retail and luxury condominiums (flats and towns).



**Client**

Legacy Partners

**Location**

Denver, CO

**Use**

Market Rate Apartments

**Facts**

- Density - 184 DU/AC
- Plans - 560-1,420 SF
- Units - 212 DU
- Area - 1.15 AC
- Parking - 213 Stalls (1.00/Unit)

**Description**

Legacy 22<sup>nd</sup> is located in an up and coming neighborhood of Downtown Denver just blocks from Coors Field on the border of the Ballpark District and the Arapahoe Square District. This Type III podium is designed to address both the pedestrian at the sidewalk with direct access to the units as well as maximize the views with a large pool deck looking toward downtown as well as roof top deck which will both look toward downtown and the mountains. Geared toward downtown living the unit sizes range from small 560 SF units to large 1,473 SF units accommodating a range of renter demographic.







## Client

Bellevue Ventures, LLC

## Location

Pasadena, CA

## Use

Retail/Whole Foods Market

## Facts

- Building - 90,000 SF
- Land - 1.2 AC

## Awards

- 2008 Gold Nugget Awards
- Best Adaptive Re-Use Project (Grand Award)



The west coast flagship for Whole Foods finds itself in the heart of Pasadena's Arroyo Parkway. This model of sustainable design is situated on the east side of the Metro Rail Gold Line and just north of the city's new Metro Rail Station. Its unique and contemporary design complements an existing historical structure providing 90,000 SF on two levels with 3 levels of subterranean parking. Skylights bathe light to spaces containing everything from organic offerings to dining experiences. Loading and servicing are seamlessly hidden within the rear of the building, allowing the front two sides to show off a charming restoration of the existing building.





**Our team does not have any exceptions to any terms or conditions within the RFQ or supporting documents.**





Bettencourt  
& Associates

# ATTACHMENT A: PROPOSER INFORMATION FORM

*Instructions: Complete the form below and remit as part of your Proposal as Attachment A.*

## PROPOSER INFORMATION

PROPOSER/CONSULTANT/ NAME: AMLI RESIDENTIAL PARTNERS, LLC

ADDRESS FOR NOTICES: 3195 REDHILL AVE.  
LOFT F  
COSTA MESA, CA 92626

MAIN CONTACT (NAME AND TITLE): NATE CARLSON, SR. DEVELOPMENT ASSOCIATE


CONTACT NUMBERS: TELEPHONE: 949.413.5716 FAX: \_\_\_\_\_

E-MAIL ADDRESS: n Carlson@amli.com

## FIRM SIGNATURE AUTHORIZATION AND CERTIFICATION

Per the California Corporate Code, Business and Professions Code, the Consultant's Bylaws/Operating Agreement and/or the attached Board Resolution (if applicable), I/we hereby verify that I/we am/are (an) authorized signatory(ies) for the aforementioned Consultant and as such am/are authorized to sign and bind the Consultant in contract with the City of Newport Beach.

### 1. CONSULTANT AUTHORIZED SIGNATORY(IES):

 SIGNATURE	<u>Jason Armison</u> PRINT NAME	<u>S.V.P.</u> TITLE	<u>11/20/12</u> DATE
SIGNATURE	PRINT NAME	TITLE	DATE

### 2. SIGNATURE AUTHORIZATION IS PROVIDED IN ACCORDANCE WITH:

- Proposer's Bylaws/ Operating Agreement      Section \_\_\_\_\_       Copy Attached
- Board Resolution       Copy Attached
- Corporate or Business and Professions Code\*\* (PROPOSER IS AN LLC)

\*\*If Consultant is a corporation, two (2) authorized signatories will be required on all documents submitted, unless specified in the organization's Bylaws or corporate resolution.

**IMPORTANT NOTE:** If the signature authorization status of any individual changes during the term of the contract, it is the responsibility of the Consultant to contact the City Administrator for the Consultant regarding the change and to complete and submit a new Signature Authorization Form. Incorrect information on file may delay the processing of any of the documents submitted.

## 8. City of Newport Beach Disclosure Statements (Attachment B)

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Bettencourt  
& Associates



## ATTACHMENT B: STATEMENT OF DISCLOSURE

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*Instructions: Each submittal must be accompanied by a signed Statement of Disclosure. This form must be completed, signed, dated and submitted by all persons proposed to serve as a Consultant Team Member.*

Consultants and proposed Consultant Team Members must disclose any and all business activities, relationships and/or business positions currently or previously held with City employees, City Council members, City commissioners, or City advisory boards/committees within the last five (5) years.

The City has determined that all persons seeking to serve as a Consultant to the City shall complete truthfully, sign, date and submit this Disclosure Statement prior to performing any consultant work or services for the District.

I, Jason Armison [NAME OF PROPOSER], hereby certify the following:

I have no reportable business activities, relationships and/or business positions with any City employees, City Council members, City commissioners, or City advisory boards/committees within the last five (5) years.

My reportable business activities, relationships and/or business positions within the last five (5) years with City employees, City Council members, City commissioners, or City advisory boards/committees (please provide a description of the business activity, relationship or business position, relevant dates, job titles, positions held, etc.):

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The foregoing certifications are true and correct. I make this certification under penalty of perjury under the laws of the State of California.

Signature of Consultant

Jason Armison

Signature Date

Nov. 20, 2012

Printed Name and Title

Jason Armison  
S.V.P.

[ If necessary, attach a separate sheet(s) detailing each instance ]



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