



URBAN LAND INSTITUTE  
ORANGE COUNTY DISTRICT COUNCIL

CITY OF LAGUNA NIGUEL  
"GATEWAY DISTRICT"

FINAL REPORT

ULI ORANGE COUNTY  
TECHNICAL ADVISORY PANEL

MAY 30 - 31, 2006



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## INTRODUCTION

On May 30-31, 2006, the Urban Land Institute Orange County District Council (ULIOC) held a Technical Advisory Panel (TAP) for the City of Laguna Niguel. The City enlisted ULIOC’s help with their desire to encourage innovative reinvention of the 300-acre Gateway district, while protecting the current revenue source.

A team of 18 professionals in the land use planning industry was assembled by the ULIOC to study the site and make recommendations to the City on how best to address this objective. The ULIOC TAP was chaired by Con Howe, Director of the ULI Center for Balanced Development in the West. The panel consisted of high-level land use professionals with backgrounds and experience in Transit-Oriented Development; Mixed Use/Multi-Use Development; Multifamily Housing; Affordable Housing; Retail Development; Commercial Development; Urban Planning and Design; Traffic/Transportation; Redevelopment; Real Estate Law or Development Agreements; and Market Research and Analysis Site. A list of the TAP panelists and their biographies are included in this report. (Appendices 1 and 2)



## SUMMARY

The TAP was tasked with focusing on the following question: Is mixed-use residential and retail development the missing ingredient in the Laguna Niguel Gateway? A Scope of Work was developed by the City of Laguna Niguel, outlining 18 questions relative to Market Demand and Potential, Planning and Design, Infrastructure and Implementation. A copy of the Scope of Work is included in this report.

In the weeks leading up to the TAP, the panelists were provided with instructions to take a driving tour of the district in order to be familiar with the area and, in particular, understand the circulation challenges. A copy of the driving tour instructions is included in this report. (Appendix 4)

The City also prepared a thorough Briefing Book that was provided to all of the panelists.

ERIS market research was provided by TAP Panelist Tom Trischler, of SITUS Development, which was also provided to City Staff and made available to the TAP panelists for the Market Demand and Potential subgroup.

On the first day of the TAP, May 30th, the panelists met with civic leaders and business owners in the Gateway district selected by the City:

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After a day-and-a-half long process, the TAP panelists presented their findings and recommendations in a PowerPoint presentation to the City Council at a Public Meeting on May 31, 2006. A copy of the PowerPoint presentation has already been forwarded to the City.

As summed up in the introduction by TAP Chair Con Howe, the panelists concluded that “housing is the key to unlocking the potential of the Gateway District; however, not anywhere or in any way. Initial housing must create a new character and sense of place.” Howe added that there must be a plan of phasing in residential development fronting along Forbes Road and that housing will not happen without certain improvements and infrastructure. In addition, financing options exist for those improvements and the Specific Plan is the vehicle for structuring the entitlements and requirements. Lastly, the Gateway district needs a “Champion” -- both in the Council and city government AND in the private sector, e.g. an enlightened developer, in order to succeed with the vision to revitalize the area.

The 18 panelists divided into three subgroups (Market Demand and Potential, Planning and Design, and Infrastructure and Implementation) to focus on the specific questions in the Scope of Work. A list of the subgroups is included in this report. (Appendix 3)

Selected members of the ULIO TAP submitted comments to be added to the written report for the Laguna Niguel TAP. Those comments are summarized below by these subgroups. This written report is supplemental to the PowerPoint presentation presented to the City Council on May 31, 2006. Additional elaborations on findings and recommendations may be provided by TAP panelists by contacting them directly.

## SCOPE OF WORK

### Summary of the Problem

The Laguna Niguel Gateway Area is a 300-acre commercial district located along the 1-5 Freeway and Crown Valley Parkway entrance to the City. In 1999, the City Council adopted the Laguna Niguel Gateway Specific Plan (see Figure 1, Gateway Land Use Specific Plan). The Specific Plan provided for a broad range of non-residential land uses including Mixed-Use Retail/Entertainment/Hotel/Office, General Commercial, Automotive Retail and Service and Light Industrial. The Specific Plan sought to encourage new private investment and revitalization of existing properties, as well as consolidation of smaller parcels, through the provision of higher density allowances for larger properties. The Specific Plan also sought to create a cohesive identity throughout the Gateway Area through an Identification Signage Program and streetscape/landscape improvements.

During the ensuing seven years, there has been minimal new development or revitalization of existing properties in the Gateway Area. A key question is whether residential development opportunity is the missing ingredient to catalyze new private investment. If there is a market for residential housing in the Gateway Area, what are the appropriate product types and where should they be located?

### Primary Goal

To encourage and facilitate revitalization of the Laguna Niguel Gateway Area.

### General Goals and Objectives for Laguna Niguel Gateway Area

1. To create an appropriate blend of mixed-use residential, transit-oriented and commercial uses in the Gateway Area.
2. To improve vehicular and pedestrian circulation and connectivity within the Gateway Area.
3. To improve traffic circulation and the Level of Service (LOS) on major arterials serving the Gateway Area.
4. To improve the physical appearance of private property in the Gateway Area through new development and revitalization of existing businesses and buildings.
5. To enhance the successful operation of existing businesses in the Gateway Area.
6. To improve the physical appearance of public property in the Gateway Area through a strong landscape and streetscape program.



7. To improve the identity of the Gateway Area through a comprehensive identification signage program.
8. To revise the Laguna Niguel Gateway Specific Plan and Zoning Code to facilitate market-driven development opportunity and flexibility.

## **Questions to be Addressed by the Panel**

### **Market Demand and Potential**

1. What is the market demand in the Gateway Area for residential development (stand-alone) and mixed-use residential/retail development?
2. Who is the target market for residential housing in the Gateway Area?
3. How will residential zoning affect the land value in the Gateway Area?
4. What is the market demand in the Gateway Area for new commercial development (i.e. Retail, Office, Hotel)?
5. How much residential development is needed to support retail/commercial uses in a mixed-use environment? What is the critical mass?

### **Planning and Design**

1. Which areas within the Gateway Area are most appropriate for residential?  
Which areas are least appropriate?
2. What types of residential development are most appropriate for the Gateway Area?
3. How do traditional suburban residential development standards and conditions need to be changed to accommodate higher-density urban residential development?

### **Infrastructure Issues**

1. What are the most critical traffic and pedestrian circulation challenges in the Gateway Area? How might they be addressed?
2. The Orange County Transportation Authority (OCTA) has allocated \$63 million for potential infrastructure improvements to increase use of the Laguna Niguel/Mission Viejo MetroLink Station. How might such funds be effectively utilized?
3. The Gateway Area is physically divided into sub-areas by the railroad tracks and flood control channel. How might these facilities be turned into assets for the Gateway Area?

**Implementation**

1. What new and creative approaches are being used to encourage private investment and redevelopment without the formal use of Redevelopment and eminent domain? What are the incentive-based zoning possibilities?
2. What are the benefits of formal Redevelopment without the use of eminent domain?
3. What financing techniques should be explored for public improvements in the Gateway Area?
4. What promotional techniques are recommended to make property/business owners, developers and investors aware of, and interested in, the Laguna Niguel Gateway and its development opportunities?
5. If residential development is permitted in the Gateway Area, how can the City ensure that a healthy-mix of non-residential uses is maintained and/or attracted to the Gateway Area? How do you get the Retail in Mixed-Use Residential/Retail projects?
6. How can the City encourage existing business/property owners to improve the appearance of their buildings and property? What tools or approaches are available?
7. If residential development is permitted in the Gateway Area, how might Affordable Housing issues and requirements be addressed?

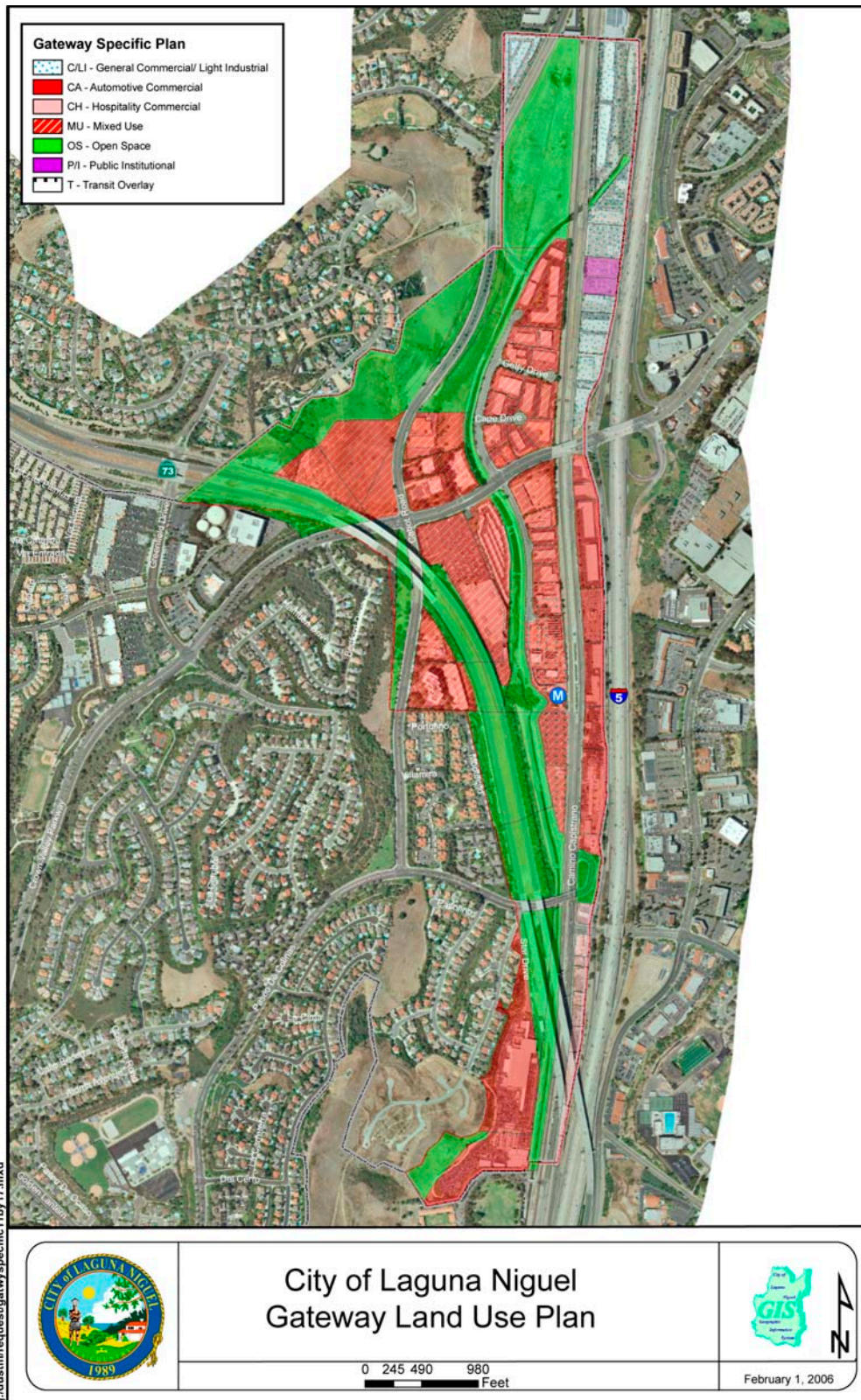


Figure 1: Gateway Land Use Specific Plan

## **MARKET DEMAND AND POTENTIAL**

The focus of the market opportunity sub-panel was to make an informed estimate of the market demand in the Gateway district, as well as recommend the most appropriate mix of land use and densities for the study area. Specifically, the panel using the data at hand plus the vast development expertise, market knowledge and land planning experience of the panel members addressed individually the market opportunities for residential, retail, office, hotel and entertainment in the Gateway district.

Upon careful review of each land use and based on the historical strength of the Orange County housing market, Residential was determined to be the key driver to unlocking the development opportunities for the Gateway area. Residential demand continues to be strong with virtually any potential development site, re-development site, and transitional real estate parcel being sought for conversion to for-sale residential. Simply put, the demand for well-located residential property is so strong that the residual economic value of residential land favors this land use over any other prospective land use.

Given this background, together with the various city identified challenges, topographical, and road infrastructure issues associated with the Gateway district, the marketing panel first recommended that specific areas within the district be identified that would be "Transformational" in creating excitement for the area. This could be achieved through the proposed development having four characteristics- verticality, massing, connectivity, and walkability. The two initial areas that the panel recommended were the south end of Forbes Road at the Metrolink station and the NWQ of Forbes Road and Crown Valley Parkway.

The transformation of these areas to a higher density model (40-60/ac) would be essential in establishing a district with an urban feel and create the necessary sense of place and momentum to change the current existing perception, identity, and image of the Gateway district.

In identifying the market driver as residential, the market panel further recommended that the appropriate target market for the proposed higher density lifestyle would be the 25-45-age group, as this demographic is more receptive to new concepts and more urban style living. This demographic also carries a "hip" factor. The panel also believed there would be a secondary demand from empty-nesters.



To further insure this vision moves forward in line with the expectations of the City Council, the district will need to select a “Champion.” To start off, the City would need to be that Champion because they are the leader of the vision. Over time this role might be transferred to a developer or the City and the developer might share that role. It is the panel's strong recommendation that the role of a Champion must continue to be at the forefront if the district transformation is to be completed.

The market panel's discussion of the other land uses revealed these observations;

- Retail- must be community-serving with some regional emphasis due to the Metrolink station, must be convenient with the character of specialty retail to include higher-quality restaurants. Total square footage should be between 75,000 to 100,000 square feet. Further due to the high visibility derived from the I-5 Freeway, the panel recommends the City continues to encourage automotive retail all along Camino Capistrano.
- Hotel- demand thought to be small, but don't rule this use out.
- Office- because of major competition and development in the Spectrum, a major office component was ruled out. Office in the district can be useful but local serving.

In conclusion, the panel gave some final recommendations for the city to consider:

- 1) In developing the sense of place in the district, walkability and connectivity must be established between the core areas as well as making a connection across Crown Valley Parkway the pedestrians and bicycles can easily access.
- 2) To permanently establish the district's sense of place in the minds of Laguna Niguel residents, employees working in the district and the many commuters passing by and thru the area, an iconic statement in terms of a monument, landscape or water feature should be prominently displayed to continually invite and remind all who pass by that they should come and visit.

In order to attract these market segments, a well-designed residential project, combined with some fun and eclectic support retail is required to create the "splash and buzz" necessary to entice retail tenants and shoppers. Such projects would be

the critical (and necessary) first component in revitalizing the area. As word of this exciting new live/play/work environment had spread in the marketplace, additional demand from consumers and developers may develop. Once the initial transformation is underway, the "organic growth" could take place, further spurring the transformation and on-going upgrade of the area. This secondary stage of the area's redevelopment would likely include additional residential and support retail, as well as possibly a boutique hotel, an entertainment component, and or non-traditional office space (work lofts, etc.).

### **Other Marketing Demand and Potential Points to Consider**

- The current pipeline of residential construction needs in the City of Laguna Niguel, in permitting and under construction, assumed over the next three years and a proper calculation of a 10-year supply.
- Connectivity could also refer to WiFi, Metrolink, AmTrak, the Freeway, and the Tollway as well as to the connection needed between the various parcels & uses. Since the Gateway is a TOD, should "transit" be highlighted? WiFi connectivity throughout the Gateway would be a fantastic amenity and position Laguna Niguel as a forward-thinking city and the Gateway as "the place to be."



## PLANNING AND DESIGN

The most appropriate locations for residential are recommended along the north and south portions of Forbes Road. This area offers the greatest opportunity for several reasons. First, the north Forbes area has larger parcels and the opportunity to consolidate parcels into larger development areas. The north Forbes area is also adjacent to the flood control basin offering a potentially usable open space amenity. Second, the south Forbes area is adjacent to the Metrolink station offering a transit oriented opportunity. The City also owns land here (parking lot) which could be utilized for an initial development competition over the existing parking. Both north and south Forbes have the flood control channel running along its west side, offering a landscaped pedestrian connection possibility as a linkage for residents here from the Metrolink station on the south end to the flood control basin open space area on the north end. This could be developed as an "urban pedestrian spine" with mid-rise residential along the east side of Forbes and the open space channel/trail running along the west side of Forbes.

Densities should be in the 40 to 80 units per acre range to accommodate mid-rise structures similar to Jamboree Road in Irvine and the Platinum Triangle in Anaheim. Higher densities may be allowed as an incentive to provide street level retail and/or transit station connections. Retail as a component of the mid-rise residential is probably only viable at or near the Forbes intersection with Crown Valley Parkway and perhaps a small amount at the Metrolink station area.

Connecting the north end of Forbes to Camino Capistrano or alternatively to Cabot Road would help the viability of the residential due to enhanced accessibility and the connection to Camino Capistrano would help the revitalization of uses at the northerly end of Camino Capistrano, as well as better access to the MetroLink station from Crown valley Parkway via the east side of the tracks. In conjunction with this idea, an additional or alternative parking structure for the Metrolink station could be built on Camino Capistrano to better balance access to the station.

Residential use along Camino Capistrano is not considered a prime location due to the freeway noise impact but limited opportunities exist for live/work type residential units.

The gateway character of the area would be enhanced by focused landscaping along Crown Valley Parkway and the inclusion of an "iconic gateway element" such as a



pedestrian bridge over Crown Valley connecting north and south Forbes Road. This bridge would also create a gateway icon for the area. Enhanced landscaping should also be implemented along Camino Capistrano to visually up-grade the character of this street. The flood control basin at the north end of Forbes should also be investigated for its potential to be a landscaped, park-like open space amenity.

Additional measures to facilitate the proposed mid-rise residential development would include tailored design guidelines and development standards which would allow reduced setbacks and parking standards, and define performance standards or incentives for providing retail as a mixed use with the residential development.

There are also several parcels that are currently vacant and available for re-use. The parcel next to the office tower on Cabot Road could accommodate either residential or additional office use. The parcels at the corner of Cabot and Crown Valley Parkway could also accommodate either residential or office and would create a better development opportunity if developed together in terms of access and circulation.





## INFRASTRUCTURE AND IMPLEMENTATION

The Gateway Specific Plan should be revised to include residential land use. The added residential component will create land value over the existing land market value that will stimulate development. Consideration should be given to incentives, such as reduced parking requirements and development fees, for providing retail and workforce housing near the Metrolink station. The high density residential and flexibility of development standards should result in desirable and vibrant residential developments with a mix of service related uses for the community and the Metrolink station patrons.

The Gateway area is constrained with lack of access between Forbes Road and Camino Capistrano and Freeway connections to the Gateway area. Roadway connections identified in the Gateway Specific Plan and connections at the north end of Forbes Road should be restudied. The roadway connections are needed now and the City should implement the connection improvements as soon as possible.

The Gateway base infrastructure – water, sewer, and storm drain may need to be revised when residential land use is introduced in the area.

With the introduction of residents in the Gateway area Laguna Niguel should increase open space by taking advantage of improving existing open space areas along flood control channel and flood control basin. A funding opportunity is to form a non-profit "Gateway Alliance" to obtain funding for open space improvements. Development fees might be able to be used as matching funds.

Forming a redevelopment area should be revisited. If not the entire district a portion could be included in a redevelopment area. The advantage to the City to capture the increase in property tax dollars to use to improve the Gateway area is a great opportunity that should not be missed. A redevelopment area could be formed and still not exercise eminent domain. Senate Bill 521 is currently under consideration that would allow redevelopment districts near transit stations without the need to make blight findings.

The City can form a Community Facilities District to pay for needed infrastructure costs associated with residential and transit related development. The City can also use development agreements to obtain needed improvements.



The Gateway project enjoys the advantage of existing funds that have been allocated to the Metrolink station area. This money can be used to construct a parking structure, improvements related to residential and retail development near the station as well as matching funds for circulation improvements.

## ULI TAP PROGRAM

The Urban Land Institute (ULI) was founded in 1936 as a non-profit institute to conduct research and provide information on all aspects of real estate development and land use policy. ULI has over 30,000 public and private sector members comprised of professionals in all aspects of real estate development, policy, and regulation. It has members in 60 countries, a staff of over 100 in Washington, D.C., with a \$30 million operating budget. The ULI has been a leader in smart growth, mixed use development, urban redevelopment, transportation, and affordable housing.

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. Often these panels meet with the sponsoring government or non-profit entity for five days at a fee of about \$110,000, and typically address issues of a broad and long-range scope.

The ULI District Councils have begun providing panel services of one or two days. A fee is charged for the advisory service, but the panel members are not compensated for their time. 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.

Sponsors request Technical Assistance Program services on specific issues which can be addressed in one or two days. The District Council assists the sponsor in refining the scope of the assignment and in organizing the panel efforts. Panels are then formed to provide the expertise to address those issues. At the conclusion of the work period, the panel issues a report with recommendations to the sponsor.

The selection of the TAP panelists consisted of reaching out to ULIOC members and confirmation with Laguna Niguel City Staff that the panelists' background and experience would be beneficial in this particular project. All TAP panelists were members in good standing of the ULIOC and instructed with the following simple guidelines:

"TAP panelists understand they are being asked to provide objective advice to the City of Laguna Niguel based on their expertise, experience and/or professional



background. It has been determined for each panelist, in advance of accepting the assignment, whether an actual conflict exists or whether one might be created by the panelist accepting an assignment. Panelists were asked to provide responses to five questions on city of residency, employment or land ownership in Laguna Niguel, elected or appointed positions held, personal or professional affiliations with business enterprises in the Gateway district, and current ULI membership.

TAP Panelists agree not to directly market their services to the City of Laguna Niguel before or during the panel assignment. ULI does not intend to preclude the City from utilizing the services of ULI members on future work for the City of Laguna Niguel. However, if the City of Laguna Niguel should approach a panelist regarding future work for the City before the panel assignment is completed, ULI requests that the panelist notify the Executive Director of the ULI Orange County District Council to verify that the panelist's potential involvement with the City in no way impacts the integrity of the Technical Advisory Panel.”

## APPENDIX 1

### LIST OF ULI TECHNICAL ADVISORY PANELISTS

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## APPENDIX 2

### TECHNICAL ADVISORY PANELISTS' BIOGRAPHIES

#### TAP Chair

**Con Howe**

**Director, Center for Balanced Development in the West**

**ULI—the Urban Land Institute**

**Los Angeles, California**

As director of the ULI Center for Balanced Development in the West, Con Howe is responsible for guiding the center's work to ensure it is effective and relevant to ULI members in the western region of the United States. Before joining ULI, Mr. Howe served as Los Angeles's planning director for more than 12 years. During his tenure with Los Angeles, Mr. Howe completed the first comprehensive revision of the city's general plan in 20 years; updated 34 out of 35 city community plans; worked to implement the new city charter with the establishment of seven area planning commissions; and implemented the development of new housing along commercial corridors and the economic reuse of older buildings.

#### TAP Panelists

**(All panelists are members of the Urban Land Institute.)**

**Kevin E. Andrade**

**Senior Managing Director**

**Trammell Crow Residential**

Kevin Andrade joined Trammell Crow Residential in 1994, as Development Associate responsible for the State of Washington. He became a partner in 1996. During his four-year tenure in Seattle, he led the development of 11 apartment and townhome projects in that region. In 1998, he was promoted to Senior Managing Director of the Southern California Division and he relocated to Costa Mesa, California. Mr. Andrade has overall responsibility for the company's construction and development activities in Southern California, which has become one of the company's most active divisions. To date, he has led the development of approximately \$900 million of multifamily product. In 1999, he became a member of the TCR Management Board. Prior to joining TCR, Mr. Andrade developed and managed residential real estate in Fresno, California as a principal of Andrade Properties, Inc. where he was involved in



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the development, construction and management of single-family, multifamily and commercial projects in California's San Joaquin Valley. Mr. Andrade received his MBA from the University of California at Berkeley in 1991. While at Berkeley, he was employed by Rosen Consulting Group, a real estate consulting and forecasting firm. Mr. Andrade holds an MS in Electrical Engineering from Stanford University and was a Hughes Fellow. He received his BS from Fresno State University in 1985, Summa Cum Laude. He is a member of the Urban Land Institute.

### **Philip Bettencourt**

#### **Bettencourt and Associates**

Philip Bettencourt is an independent real estate development planning consultant based for nearly two decades in Newport Beach. Mr. Bettencourt's firm provides land development acquisition and analysis, as well as governmental entitlement to use services for builder clients. He is also chairman of the board and president of Cortese Properties, Inc., the Leisure World retirement communities successor. His more than three decades of experience in real estate includes executive positions with leading Southern California homebuilder and land development companies. Mr. Bettencourt has considerable experience in Laguna Niguel, including processing of the Development Agreements for Marina Hills, a Taylor Woodrow community; Bear Brand Ranch, a Shea Homes community; and Bear Brand, a Standard Pacific community. In addition, his firm completed an interim civic center feasibility study for the County of Orange for the Laguna Niguel site. Most recently, his firm collaborated with Kevin Weeda in entitlement planning for Cannery Lofts and the approved South Brea Lofts, both mixed use developments. He is the past president and executive officer of the Building Industry Association (BIA) for Orange County, and was the founding president of the BIA of Kern County, California. He also served as a member of the City of Irvine Transportation Authority, the Orange County Charter Commission, and the Restoration Advisory Board for the US Naval Weapons Station, Seal Beach. In his civic life, Mr. Bettencourt is the former chairman of the board of the Newport Beach Chamber of Commerce and is the immediate past president of the 1,600 home Newport Coast Community Association. Philip and his wife Meredith and his daughter, Amanda, reside on the Newport Coast.

**Stan Braden, AIA, NCARB**

**Chairman/Principal**

**KTGY Group Inc.**

Stan Braden brings to the KTGY GROUP over 33 years of architectural experience. Prior to joining the firm in 1992, Mr. Braden was a partner with Scheer Braden Architects in Irvine, CA. Mr. Braden has been responsible for the design of many successful built projects including clubhouses, restaurants, and high density residential projects ranging from \$2 million to \$60 million. After serving as President of the KTGY GROUP for 10 years, Mr. Braden is now Chairman of KTGY's Board of Directors. His leadership in high density housing, mixed-use, and commitment to the Mission Statement assures that KTGY clients will receive the highest level of Planning, Design and Architectural services. Mr. Braden holds a Bachelor of Science in Architecture from the California State Polytechnic University, Pomona, and is a Licensed Architect in California, Nevada, New Mexico and Arizona.

**Gregory S. Brown, CCIM**

**Managing Principal**

**BH Urban Equities**

Greg Brown is a 15-year veteran of Southern California retail real estate brokerage, investment and development. He has sold over one hundred income producing commercial properties in his career totaling over \$800,000,000 in value. He is a founding Managing Member of BH Urban Equities, LLC, BH Management Services, LLC, and managing partner of BH Investments. Mr. Brown has led the entitlement of an-18 unit luxury, courtyard housing community in Rolling Hills Estates, and is the lead on a 140,000-square-foot village scale center in Yorba Linda, Calif. Following his graduation from UC Irvine in 1990, he immediately joined Grubb & Ellis as a commercial investment real estate broker specializing in the sale of retail shopping centers. Thereafter, he was associated with Sperry Van Ness and Marcus & Millichap, where he was nationally recognized as one of the Top 20 retail shopping center brokers in the nation for each firm. In 2005, Mr. Brown and his partner formed the Hanley Brown Group, which has quickly become a market leader in the sale of shopping centers throughout Southern California. To date, the group has transacted just under 1 billion dollars of retail center sales in the primary five county Southern California region, making Mr. Brown among the industry's top sales brokers in this field. Mr. Brown is also member of the Building Industry Association (BIA) and the Congress of the New Urbanism (CNU).



**Robert Budetti, Jr. AIA, NCARB**  
**Vice President, Retail Unit Manager**

**Carter+Burgess**

With more than 17 years of experience with the retail design, production, and construction process, Mr. Budetti has considerable expertise in leading and managing diverse groups of people to work as a team and to focus on a common goal. Mr. Budetti has worked closely with many local, regional and national developers on a variety of neighborhood, power, lifestyle, mall and retail entertainment centers. Mr. Budetti also has extensive experience in designing and building stores at a national level. Mr. Budetti has worked with notable clients that include Old Navy, Target, Best Buy, Cingular, Zany Brainy, J. Crew, William Sonoma, Pottery Barn, Vons and Bristol Farms. Mr. Budetti holds a bachelor of architecture from California State Polytechnic University, Pomona. He is a registered architect in 14 states, including California.

**William Devine**

**Partner**

**Allen Matkins Leck Gamble & Mallory LLP**

William R. Devine is a partner in the Orange County office whose practice focuses on the land use, environmental, and natural resources aspects of real estate development. He assists residential and commercial developers, utility companies, power producers and other commercial interests in a wide range of entitlement and permitting issues. Mr. Devine regularly represents clients before local, state and federal administrative bodies, as well as in preparing for litigation. Mr. Devine's wide-ranging expertise includes land acquisition due diligence, CEQA/NEPA compliance, endangered species, wetlands, coastal law, planning and zoning, water quality, water supply/rights, vested development rights, annexation, initiatives and referendums, subdivision mapping, redevelopment, affordable housing, energy and Indian law. Prior to joining Allen Matkins, Mr. Devine was a partner at a prominent, full-service law firm. His past experience also includes a position at the Solicitor's Office of the U.S. Department of Interior in Portland, Oregon and Sacramento, California, where he represented the Department and its agencies on a broad range of matters involving water rights, environmental cleanup, endangered species, wetlands, NEPA compliance and Indian affairs. Mr. Devine is a frequent speaker on topics related to CEQA, Habitat Conservation Planning under the Endangered Species Act, Water Supply/Rights and Wetlands Mitigation Permitting. Mr. Devine is admitted to practice

in California, Colorado and Washington, he is a Member of the Building Industry Association, California, Southern California, Orange County, and Riverside County, the Urban Land Institute, Public/Private Partnership Council and Orange County District Council, and the National Association of Office and Industrial Parks, Southern California Chapter. Mr. Devine received his J.D., cum laude, from Reuben Clark Law School, Brigham Young University in 1981, as well as his M.S. in 1978. He received a B.S. in 1974 from California State Polytechnic University. Mr. Devine is Chair of the ULI Orange County District Council.

**Erik S. Hansen**

**Senior Vice President**

**LNR Property Corporation**

**Commercial Property Group**

Erik Hansen is responsible for directing the acquisition and entitlement of various commercial retail, industrial office and apartment projects in the Inland Empire, Orange County and southeastern Los Angeles County marketplaces of Southern California. Mr. Hansen has over 30 years experience in commercial real estate. Prior to joining LNR in 2003, he served as the Managing Partner of commercial development activities in Southern California for Lincoln Property/Legacy Partners for 20 years. During that time he directed and participated in more than 19 million square feet of commercial real estate acquisition, development and management projects. Previously, Mr. Hansen was a salesman and Sales Manager for Coldwell Banker (now CB Richard Ellis). He served as a Navy Officer aboard destroyers based out of Long Beach, California. Mr. Hansen earned a bachelor's degree from the University of Montana and a Post Graduate Degree from the Thunderbird Graduate School of International Management in Phoenix, Arizona. He is a licensed California real estate broker. He is a member and former President of the local chapter of the National Association of Industrial and Office Parks (NAIOP). He is also a member of the International Council of Shopping Centers (ICSC) and serves on various charitable and church boards.

**Roger W. Mobley, AICP**

**RGP Planning and Development Services**

Mr. Mobley has a broad planning and management background in both public and private sector organizations, giving him a well-rounded combination of experience in public policy planning, planning program implementation, planning design, engineering, and environmental assessment. In addition, he has extensive experience in management, strategic planning, client relations, community relations



and inter-departmental coordination. With career experience of more than 35 years in both the public and private sectors, Mr. Mobley's private sector experience gives him a good understanding of client relationships and needs and the dynamics of the real estate development process, while his public sector experience gives him a good understanding of public administration dynamics and the governmental decision-making process. This blend of experience includes management, technical and practical experience. He has coordinated and managed multi-discipline professional staffs requiring technical knowledge and the management ability to achieve product delivery and client satisfaction within time and budget constraints. He has also served as a municipal Planning Director. This experience, along with his practical experience in community planning, urban design, management, engineering and community development issues provide a significant resource. Mr. Mobley has an M.B.A., Business Administration, National University, and a B.A., Geography, California State University, San Jose. He has also completed graduate studies coursework in Urban and Environmental Planning, California State University, San Jose.

**Jon Nesbitt**

**Vice President, Financial Services Group**

**Grubb & Ellis**

Jon Nesbitt has been a commercial real estate broker for 13 years. He joined Grubb & Ellis Company in March 2004, as a Vice President in the Financial Services Group. Prior to joining Grubb & Ellis Company, Mr. Nesbitt was a Director for Cushman & Wakefield for eight years and Cushman Realty Corporation for four years. During Mr. Nesbitt's career, he has sold apartment, industrial, office and retail properties across the United States in addition to California, including transactions in Arizona, Illinois, New York, Nevada, North Carolina, Texas and Utah. As an investment sales specialist, he has sold properties with an aggregate value in excess of \$1.7 Billion. Clients represented include Aetna, Archon Group, AT & T, Bank of America, Chevron, CIGNA, Cornerstone Advisors, Equitable Life, Equity Office, Lend Lease, MetLife, R & B Realty Group and TIMCREF. He began his career as an office leasing broker specializing in tenant representation and high-rise office buildings in Downtown Los Angeles and adjacent suburban markets including Burbank, Glendale, and Pasadena. In his leasing career he completed 89 lease transactions for 820,000 square feet, with an aggregate transaction value of \$144.5 Million. Major clients represented include NBC, Pacific Bell, Warner Bros., Texaco, Disney, Maxicare, Public Storage, Mutual of Omaha and Avis. Mr. Nesbitt holds a Bachelor of

Science in Business Administration from the University of Southern California and master's degree in Business Administration from Pepperdine University.

**Ken Ryan**

**Principal**

**EDAW, Inc.**

Ken Ryan is a Principal with the international design firm of EDAW, Inc. As an Urban Planner, Mr. Ryan has over 20 years of working throughout the U.S. with significant work done in Orange County. Just a few of the wide range of project's, Mr. Ryan has been involved with include; Chapman University in Orange, Anaheim's Arrowhead Pond and Platinum Triangle, San Antonio's new urban entertainment/national sports mixed-use district, Irvine's IBC Urban Design Strategy, Desert Willow Resort in Palm Desert and the San Pedro Waterfront Promenade. MR. Ryan also currently serves as a Council Member and two-term past Mayor of the City of Yorba Linda. He also serves on several regional boards including current two-term Chairman of the Foothill/Eastern Transportation Corridor Agency. He is a guest lecturer at USC, Cal Poly Pomona and UCI and has published numerous articles regarding planning and California's future. Mr. Ryan received his Bachelor of Science degree in Urban Planning from California State Polytechnic University, Pomona, CA. He was recently selected in Builder and Developer's Who's Who in Homebuilding and identified as one of North Orange County's "25 Most Influential People" in the March edition of North Orange County magazine, and will be one of the three representatives from the United States participating in an International Roundtable discussion at the VNU Multi-Housing World conference in Shanghai, China this coming June.

**Shaheen Sadeghi**

**The Lab LP**

Seeing first hand the need for unpredictable and fresh retail presentations for the disillusioned youth market, Shaheen Sadeghi brought his 25 years of experience in international research and design, knowledge of trade manufacturing, management, operations, and forecasting global market trends to unconventional retail brick and mortar. The story begins in 1993 with Mr. Sadeghi's experimental transformation of a run down factory in Orange County's hub, Costa Mesa, into a hip, urban, ever evolving retail indoor-outdoor mecca called The LAB, still generating international attention after 12 years of local growth. The project resounds with success as a model of niche retailing to urban youth bored with the homogenization of the shopping mall formula in America. Anchor tenants include Urban Outfitters complimented with specialty operators Habit, Black & Blue, Carve, Eye Five, Buffalo



Exchange, Subject Matter, Blends sneaker shop, Great Laundry, Arth hat boutique and trendy Crew Salon. Restaurants Gypsy Den Café, Habana Cuban and Zipangu restaurant feature local musicians, dancers and poets regularly. The “Living Room” central common area often offers poetry readings, acoustic music, film events and art exhibits. Opened in 2002, The CAMP offers the first known concentration of specialty retailers catering to the authentic outdoor sports trade. Traditional camping, hiking, biking, skating, and surfing retailers are presented in a modern, campus-type complex offering an outdoor amphitheater, dive pool, fire pit surrounded by indigenous vegetation, etc. Anchors Adventure 16/Patagonia, Active Ride Shop, Liburdi’s Scuba and Cycle Werks are complimented with tenants such as vegan restaurant Native Foods (in a yurt), Bikram Yoga, Village Bakery and AIRe Restaurant. Prior to working in retail development, Mr. Sadeghi served as president of Quiksilver, Inc.; Executive V.P. at Gotcha; and a Merchandiser and Designer of Jantzen, a division of VF Corp. After obtaining a B.A. Design Degree from New York’s Pratt Institute in 1977, designerships included working for Charles James, a foremost American couturier, Mary McFadden and John Anthony. After relocating to the west coast, design positions included Catalina Sportswear, a renowned manufacturer of women’s and men’s sportswear.

**John Shumway**

**Principal**

**The Concord Group**

John R. Shumway is a principal with The Concord Group with offices in Newport Beach, San Francisco, California. The Concord Group is a real estate advisory firm providing strategic advice and analysis for land use issues in the development of residential, commercial office, retail, and industrial projects. Mr. Shumway’s broad range of clients includes land developers, homebuilders, institutional investors, family landowners as well as public agencies and universities throughout the nation. Mr. Shumway has extensive experience, spanning 23 years, in the evaluation and analysis of both residential and commercial properties. He has lead in numerous engagements that focused on the optimum mix of land uses that would insure timely absorption of the property and bring enhanced land value to the landowner. From a density standpoint, these engagements range from large Master Planned Communities planned for hundred of homes to infill mix use developments in the urban city core. 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 a

longstanding member of the Urban Land Institute. Recently, Mr. Shumway was selected to participate on the first panel, to develop and publish the 10 principles of Transit Oriented Development. He is a frequent guest lecturer before professional organizations, UCI and UCLA classes, as well as other academic groups. Mr. Shumway has also spoken overseas, including a recent lecture to a group of key Japanese homebuilders interested in learning strategies to expand market penetration in a downsizing economy. Mr. Shumway is a graduate of the University of Oregon with a degree in Business/Economics. He is very active in local community and civic groups. Mr. Shumway resides with his wife and son in the City of Irvine.

**Steven W. Spillman**

**Executive Vice President and Operating Officer**

**Emerald Development Company**

Steve Spillman is Executive Vice President and the operating officer of Emerald Development Company, an affiliate of the \$7 billion real estate investment bank W.P. Carey. The company specializes in the development, redevelopment, and acquisition of income-producing properties and corporate facilities in the U.S., Europe, and Asia. During the past 30 years, Mr. Spillman has been responsible for all aspects of the development and operations of high-density U.S. and foreign projects, including office, retail, residential, recreational, hotel, medical, industrial, and mixed-use. Prior to joining Emerald, he founded Pacifica Companies and was a Principal at Mitsui's Birtcher with responsibility for commercial and residential mixed-use developments in southern California and the southwestern U.S. While at national companies such as Aetna's Urban Investment and Development Co., Jaymont Properties, and Burnham Properties, Mr. Spillman managed the development and operations of high-rise infill and suburban projects in New York City, Boston, Cleveland, Chicago, Milwaukee, Dallas and Houston. He began his career as an architect who entitled, designed, and built commercial, residential, and medical properties, including master planned communities and mixed-use projects. Mr. Spillman is a member of the Urban Land Institute's leadership, Founding Chair of Centraplex Marketing Consortium, Founding Director of the Pediatrics Infectious Disease Research Foundation, and is a 15-year Advisory Board member of the Japan America Society. He has chaired major conferences and continues to be a moderator and speaker at national real estate events. Mr. Spillman graduated cum laude from Kansas State University with a Bachelor of Architecture, earned an MBA in Finance from the University of Missouri, and was a Purdue Everham Scholar. He is a registered architect and a real estate broker.



**Thomas J. Trischler**

**Principal**

**SITUS Development**

Thomas Trischler is a real estate development professional whose career spans more than 33 years. His experience includes: real estate developer, real estate economist, real estate broker, architect, urban designer, environmental and urban planner, and educator. He has dealt with the complete real estate project development and construction process - from acquisition, initial feasibility studies and strategic plans, through entitling, planning and designing the projects, to managing their development and construction - as both a consultant and developer. During his more than three decade career, he has been involved in projects totaling more than 180 million square feet of hotel/resort, entertainment, recreational, restaurant, retail, commercial office, research and development, industrial and mixed-uses; and over 140,000 residential units. His broad interdisciplinary expertise and dual degrees bring unique balance and a wide range of capabilities to his clients. In 1983 he formed his consulting firm, Trischler Associates, and has advised real estate developers, land owners, public and government entities on urban, suburban and new community projects totaling over 120 million square feet of mixed-use, hotel/resort, entertainment, recreational, restaurant, retail, commercial office, research and development/flex and hi-tech, and industrial projects, and more than 60,000 residential units. In 1987, Mr. Trischler also formed Situs Development, to undertake land development, urban and suburban in-fill and Brownfields developments, primarily as a general partner in separate joint venture entities formed with the landowners. He is a California licensed Architect and Real Estate Broker, as well as a Real Estate Economist. He also serves as an Examination Commissioner for the California Architect's Board. He has an MBA degree in Real Estate Economics and Finance from the University of California, Los Angeles (UCLA), and a Bachelor of Science in Architecture and Urban Planning from the University of Southern California (USC).

**Philip C. Wall**

**Centurian Partners**

Philip Wall has been in the real estate business for over 25 years and has held executive positions in both the development and private capital and finance fields. His varied experience and knowledge of the housing and commercial development process, allows him to lead complex development efforts in urban areas. Mr. Wall's

development career included the development of the Hyatt Regency Hotel and adjoining office tower, and the Embassy Suites Hotel in Central Orange County. He was responsible for capital structures and negotiation of financing for Forest City Residential West, in the Western Region. Major projects include 101 San Fernando in San Jose, 322 mixed income multi family units, The Enclave, 585 units in San Jose, and The Heritage, 2 city blocks of townhouse multi family units, in downtown San Diego. Mr. Wall's financing active were accomplished through GMAC Commercial Mortgage, and he also directed the operations for Forest City Capital Corporation for the Western United States. Mr. Wall has specialized over the span of his career in public/private partnerships and Re-development activity. Types of projects completed include high density housing developments, office towers, full service hotels, and land development. Currently Mr. Wall is involved in the development and financing of two high end market rate condominium Towers in the downtown core of San Diego. Mr. Wall sits on the board of the Orange County Affordable Housing Alliance, and is a member of ULI. Mr. Wall has been a lecturer at Harvard Business School and the University Of Colorado School Of Architecture. Mr. Wall holds a Bachelor of Environmental Design, University of Colorado; a Masters in City and Regional Planning, Harvard University; Professional Executive Education, Urban Mixed Use Development, Harvard University.

**Susan Whittaker**

**Senior Associate**

**The Sapetto Group**

Susan Whittaker is an Urban Planning and Development Professional with over 23 years of experience. Ms. Whittaker is a key member of The Sapetto Group, Inc. team and works with many major clients including: Maguire Properties, Lennar, KB Home and Centra Realty. Her development experience is an asset in preparing entitlement strategies, due diligence reports and processing development approvals throughout southern California. Ms. Whittaker also coordinates the community outreach programs for development proposals. She created and implemented a highly successful community meetings program for the recent Urban Land Institute study of North Hollywood for the Community Redevelopment Agency – Los Angeles and Metropolitan Transportation Agency (MTA). Ms. Whittaker has served on many community committees representing the development community including Tustin/EI Toro Base Closing Committee, sign ordinance revisions, Irvine Business Complex Infrastructure Committee, waste management and child care. She served as President of the Irvine Business Complex Consortium, a member of the Board of Directors for the Irvine Transportation Authority from 1990 to 2002 and the Irvine



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Children's Fund from 1998 to present. From 2002 to 2004, Ms. Whittaker established Planning Starts, LLC a firm providing planning and development services to public and private companies. Her experience includes successfully managing the environmental review process for a property listed on the National Historic Registry. From 1989 to 2002, Ms Whittaker was with the Trammell Crow Company and was the Director of Entitlement and Property Operations for the Park Place property in Irvine California. Ms. Whittaker successfully managed the entitlement process for the large-scale mixed-use project that included office, retail, and hotel with mid and high-rise residential. During her work with Trammell Crow Company she represented the owner as a member of the design team and coordinated construction projects including master planning and infrastructure improvements. She successfully coordinated design teams and managed the land subdivisions for the property. She designed and coordinated the implementation of a paid parking program for the Park Place site as the Director of Property Operation.

**Sarah Wilkinson**

**Senior Planner**

**EDAW**

Sarah Wilkinson trained as a landscape architect and town planner in the UK and has over 20 years experience in the fields of urban regeneration and downtown revitalization projects. Ms. Wilkinson worked for a city government in the UK for over 10 years where she was responsible for successful regeneration projects, including Salts Mill, Saltaire and Bradford Centenary City Center.

Prior to joining EDAW, she worked for Glatting Jackson, a community planning and design firm in West Palm Beach, Florida. She was actively involved in the implementation of a new City Revival Movement, to help redesign the Public Realm within Southern Florida. Sarah moved to California in 2005 and joined EDAW as a Senior Planner in the Irvine office. Most recently, she worked on the Irvine Business Complex Overlay District. To meet the pressures facing the City of Irvine for residential development and higher densities within Orange County, Ms. Wilkinson developed a vision to redevelop the business complex as a mixed-use and residential district. Ms. Wilkinson is a licensed Landscape Architect and Town Planner in the UK. She has a Bachelor of Science degree in Town and Regional planning from Duncan of Jordanstone College of Art, Dundee, Scotland and Postgraduate Diploma in Landscape Architecture from the University of Central

England. Her broad range of experience both in the UK and the USA, brings a unique European thinking to traditional American planning methods.

**Alex Wong**

**Principal**

**Red Oak Investments, Inc.**

Alex Wong co-founded Red Oak Investments, Inc. with Joe Flanagan in 2005. From 1998 to 2005, Mr. Wong worked for Trammell Crow Residential. As Managing Director, he identified, acquired, and entitled projects in Los Angeles County, Orange County, and San Diego. He held primary responsibility, as an equity partner, for the success of those projects from start to finish. His work represents 1,300 units of luxury housing development and \$100 million of gross profit for Trammell Crow and its equity partners. The Savoy project in Downtown Los Angeles was the most profitable project in Trammell Crow Residential's 30-year history. From 1992 to 1998, Mr. Wong worked for Community Corporation of Santa Monica. As Development Director there, he managed a staff of project managers and held primary responsibility for the acquisition, entitlement, and finance of 12 buildings with 100% low-income housing. Mr. Wong was graduated from Harvard with a bachelor's degree in Economics.



## APPENDIX 3

### TECHNICAL ADVISORY PANEL SUBGROUPS

#### **Market Potential**

Kevin Andrade  
Greg Brown  
Erik Hansen  
Shaheen Sadeghi  
Steve Spillman  
John Shumway

#### **Planning and Design**

Stan Braden  
Rob Budetti  
Roger Mobley  
Ken Ryan  
Sarah Wilkinson

#### **Infrastructure and Implementation**

Phil Bettencourt  
Bill Devine  
Tom Trischler  
Philip Wall  
Susan Whittaker  
Alex Wong



## APPENDIX 4

### DRIVING TOUR

**Approximate mileage: 10**

**Approximate time: 30 minutes, with no stops Notice signage throughout the district**

**1-5 Freeway, Crown Valley Parkway exit west. Turn left on Forbes Road to end.**

- Points of Interest: Sepulveda Building Materials, Laguna Niguel/Mission Viejo Metrolink parking lot, pedestrian underpass to Metrolink and businesses on Camino Capistrano, flood control channel, Cost Co.

**Head back (north) on Forbes to Crown Valley Parkway. Cross Crown Valley Parkway to end (not a thru street).**

- Points of Interest: Vacant Clark Foam building, small businesses.

**Head back (south) on Forbes to Crown Valley Parkway. Turn right on Crown Valley Parkway. Turn right on Cabot. Turn around at Saddleback Business Park on left, just past Shur-guard Self Storage, the last business located in Laguna Niguel limits. If you've gone to Vista Viejo, you've gone too far.**

- Points of Interest: Vacant Yamaha site at corner of Crown Valley and Cabot; flood control basin, and residential access.

**Head back (north) to Crown Valley. Cross Crown Valley to end. Turn left on Paseo de Colinas.**

- Points of Interest: Brakke-Schafnitz glass mid-rise, adjacent vacant building, high density residential, entrance to Mission Viejo Mercedes Benz.

**At bottom of hill, turn right on Camino Capistrano to end (not a thru street). Turn around at S.O.C.W.A. Head back to Avery, turn left to access 1-5 or cross Avery and turn left into In-N-Out Burger.**

- Points of interest: Allen Cadillac, small businesses, Metrolink station, gas stations, motel, restaurants.



## APPENDIX 5

### ADDITIONAL RESOURCES

#### Re: Retail Development

Michael Beyard  
Senior Resident Fellow, Retail  
Urban Land Institute  
1025 Thomas Jefferson Street, NW  
Suite 500 West  
Washington, D.C. 20007-7140  
Office: (202) 624-7093  
Fax: (202) 783-2501  
Email: [mbeyard@uli.org](mailto:mbeyard@uli.org)

#### Re: Urban Development

Maureen McAvey  
Senior Resident Fellow, Urban Development  
Urban Land Institute  
1025 Thomas Jefferson Street, NW  
Suite 500 West  
Washington, D.C. 20007-7140  
Office: (202) 624-7089  
Fax: (202) 783-2501  
Email: [mmcavey@uli.org](mailto:mmcavey@uli.org)

#### Contact:

Phyllis B. Alzamora  
Executive Director  
Orange County District Council/Urban Land Institute  
949 973-0041  
[palzamora@uli.org](mailto:palzamora@uli.org)