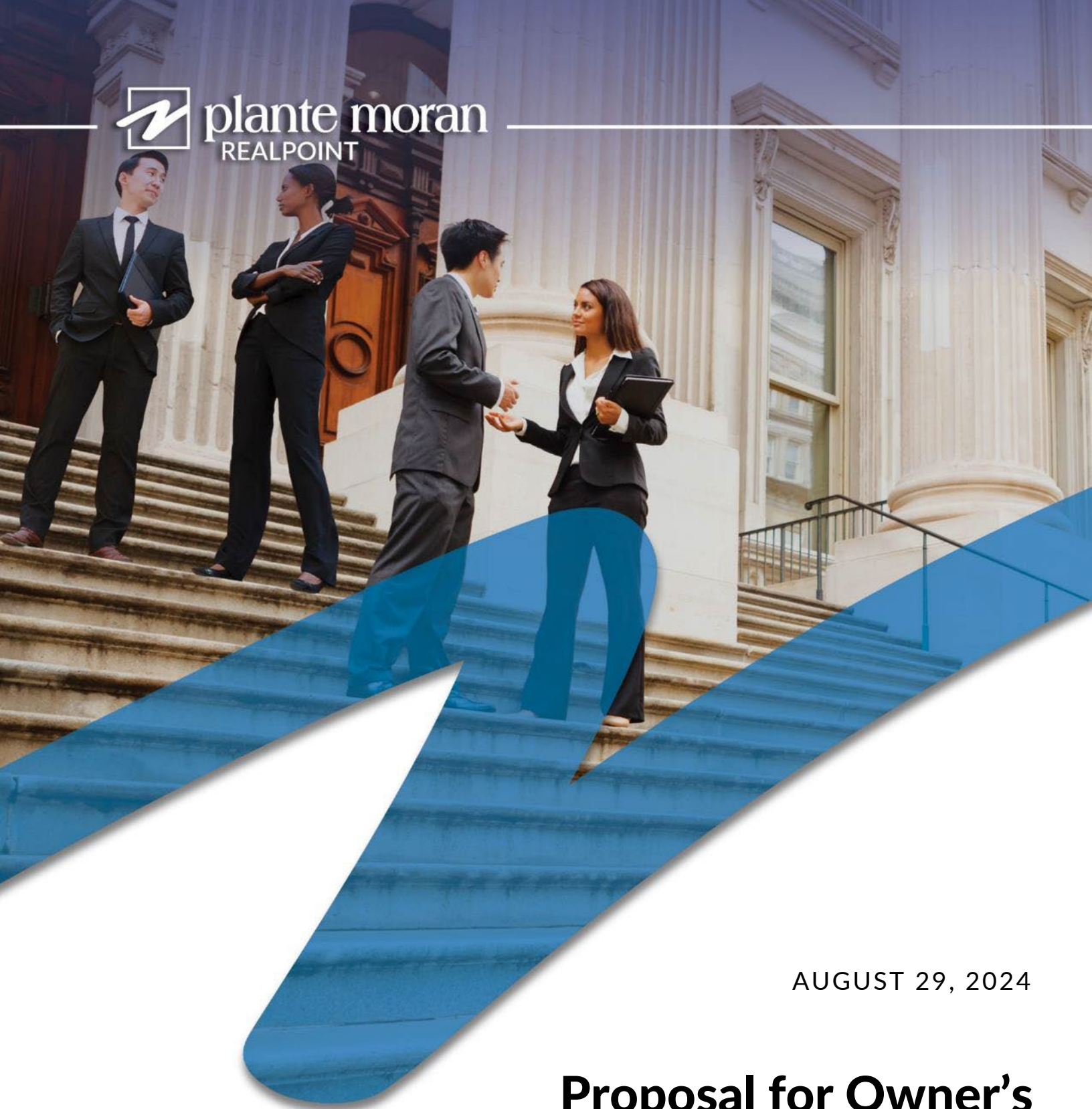




plante moran
REALPOINT



AUGUST 29, 2024

Proposal for Owner's Representative Services for New Public Safety Buildings

Presented to the City of Novi

The City of Novi
Finance Department
45175 Ten Mile Rd
Novi, MI 48375

Re: Request for Qualifications for Owner's Representative Services for New Public Safety Buildings

Thank you for allowing Plante Moran Realpoint (PMR) the opportunity to submit our proposal for owner's representative services to the City of Novi (the City). Our goal is to provide a suite of services that will work in harmony with your organization, and to be your trusted advisor for this important engagement. We believe PMR can provide the City with the most comprehensive and experienced team to conduct this process and build on the work undertaken by the City to date.

Teaming with our firm offers the following benefits to the City of Novi:

Relevant Public Sector Experience: In the past five years, PMR has successfully completed more than \$5 billion worth of capital projects for the public and municipal sectors (i.e., police stations, courthouses, K-12 school buildings, libraries, fire stations, city halls, etc.). This includes the renovation and expansion of more than 500 facilities, with costs ranging in value from \$1 million to more than \$300 million.

We understand municipalities: We specialize in working with mission-driven, consensus decision-making bodies. Our experience working on billions of dollars in public projects means we understand the challenges and opportunities these types of projects present.

We are local: We have 11 offices in Michigan, and our headquarter office, in Southfield, Michigan, is just 30 minutes away from the City of Novi.

Independence: We will represent and advocate on behalf of your municipality, which allows us to provide unbiased recommendations throughout the project as your independent advocate. Your project savings go BACK into your projects, NOT into our pockets.

Custom Solutions: Our team resources are robust; however, our approach is truly unique in that we offer customized solutions to your project needs.

We look forward to the opportunity to work with the City to achieve the goals and objectives are met. Again, thank you for the opportunity to present this proposal. We look forward to discussing it in more detail with you.

Sincerely,



Gregory P. VanKirk, CPA
Partner
Greg.VanKirk@plantemoran.com
(248) 223-3395



Andy Fountain
Principal
andy.fountain@plantemoran.com
(248) 603-5088



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SECTION 1

Business Organization

Firm overview

Plante Moran Realpoint introduction

We're built different to help you realize the most with your real estate.

As full-service real estate advisors, we're purpose-built to apply our deep, industry-specific experience across your real estate needs, whether consulting, transactions, capital projects, or development advisory. We're invested in your success, creating unexpected solutions to make your real estate a strategic advantage.

With Plante Moran Realpoint, you make better real estate decisions, achieve your milestones, and flourish in your space. We'll sharpen your big picture, invest in our long-term relationship, and measure our success by what matters most to you.

We bring a team of true industry professionals

Our team of professionals brings a broad background of experience and skills. We serve as an extension of an organization by creating a customized team dedicated to addressing your evolving needs. Our team members have previous experience as:

- | | | |
|------------------------------|--------------------------------|---------------------------------|
| ✓ Accountants/CPAs | ✓ Development Specialists | ✓ LEED-Accredited Professionals |
| ✓ Architects | ✓ Engineers | ✓ Project Managers |
| ✓ Attorneys | ✓ Financial Analysts | ✓ Real Estate Professionals |
| ✓ Construction Professionals | ✓ FF&E Procurement Specialists | ✓ Relocation Managers |

Scalable to any industry and size

Our clients span corporate offices to K-12 schools, single buildings to global portfolios. You get the full depth and breadth of our experience, no matter the industry or scale of the project.



One firm, infinite resources



plante moran

Plante Moran is one of the nation's largest certified public accounting and business advisory firm, providing clients with financial, human capital, operations, strategy, technology, and family wealth management services. Our dedication to exceptional accounting and management consulting is nearly 100 years in the making.



plante moran
REALPOINT

130+ multidisciplinary staff specializing in real estate and construction

55+ in-house design and construction professionals

\$1.5B+ in real estate assets under management

\$6B+ in active construction program oversight

Millions of square feet in real estate transactions

Structured differently — to serve you differently

Our “**one-firm**” firm philosophy is a unifying structure that prioritizes client service over maximizing profits. You receive the collective power of the firm and all its affiliates, not just an individual team or office.

What does all this mean for you?



SEAMLESS SERVICE

Engaging with us will give you unfiltered access to the right experience at the right time through our affiliation with Plante Moran and Plante Moran Realpoint.



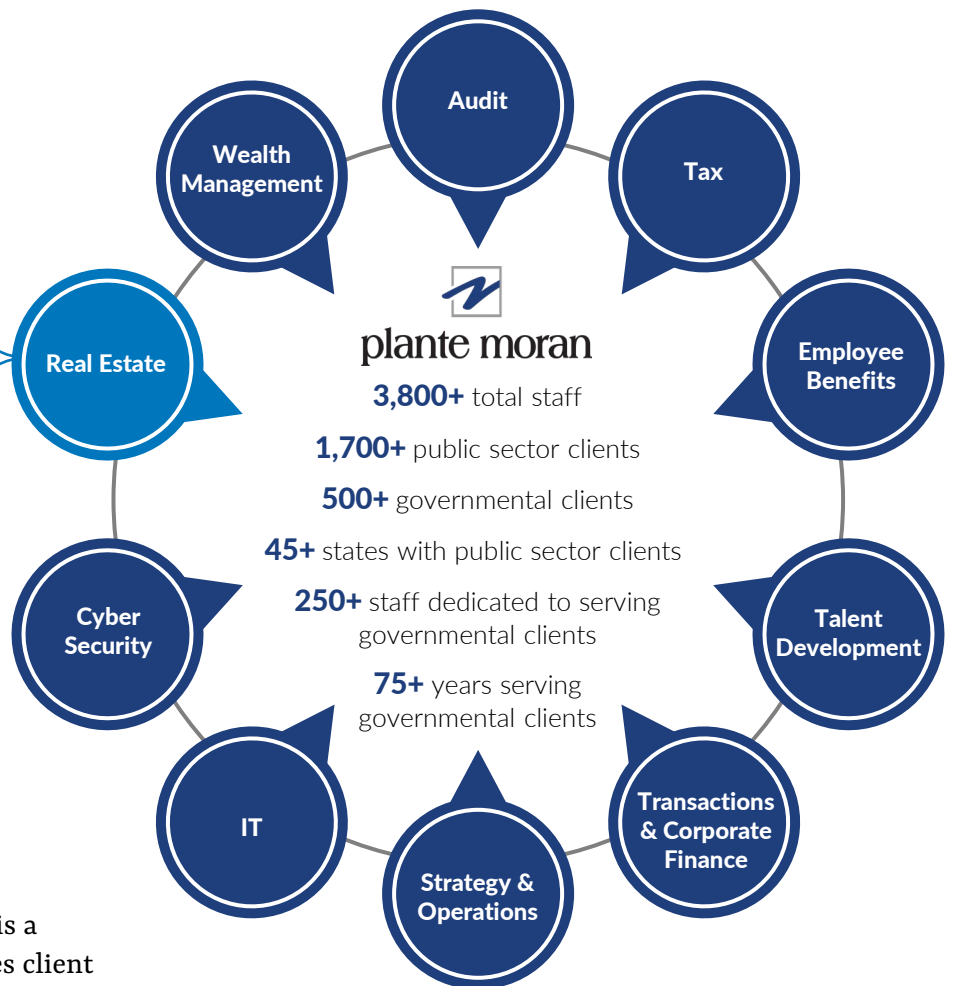
PERSONAL TOUCH

The better we know you, the better we can serve you. We build lasting relationships to foster a client-focused, collaborative culture.



FUTURE-FOCUSED

Your future is our priority. We partner with you to help you achieve your goals today and beyond.



Real estate & construction “department for hire”

We seamlessly integrate into your organization, providing the necessary experience for any real estate or construction project through a single point of contact.

Our services include:



Real estate consulting

- Development advisory & feasibility
- Real estate strategy
- Incentives
- Public-private partnerships
- Market studies
- Highest & best use analysis
- Workplace & space utilization



Real estate transactions

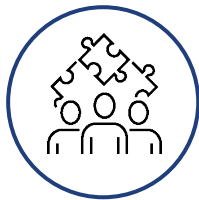
- Occupier representation
- Investment acquisitions & dispositions
- Debt procurement
- National site selection
- Sale-leasebacks
- 1031 like-kind exchanges
- Lease administration



Owner's representation / development advisory

- Project feasibility & delivery methods
- Program budget, schedule, & scope development
- Team selection & procurement
- Project management
- Design & construction oversight
- Furniture, technology, & equipment coordination

The Plante Moran Realpoint difference



Experience you can count on

In the past five years, PMR has successfully completed more than \$5 billion worth of capital projects for the public and municipal sectors (i.e., police stations, courthouses, K-12 school buildings, libraries, fire stations, city halls, etc.). This includes the renovation and expansion of more than 450 facilities, with costs ranging in value from \$1 million to more than \$195 million.



Your trusted advisor

We will represent and advocate on behalf of your organization, which allows us to provide unbiased recommendations throughout the project as your independent advocate. Your project savings go BACK into your projects, NOT into our pockets.



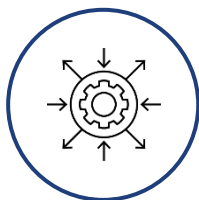
Custom solutions and unmatched resources

Through our affiliated entities, we have the resources of more than 3,800 professionals. With such robust team resources, our approach is truly unique in that we customize and create holistic solutions to fit your project needs.



Knowledge of design and construction professionals

With our local, regional, and national experience in owner's representation and as a program management firm, we have successfully worked with national design and construction firms on a range of projects. We can help your organization identify the right vendors for this project.



Scalability & business acumen

We offer our clients scalability and an understanding of the business and financial components that make programs successful.



We understand municipalities

We specialize in working with mission-driven, consensus decision-making bodies. Our experience working on billions of dollars in public projects means we understand the challenges and opportunities these types of projects present.



SECTION 2

Relevant Experience

Relevant Experience



City of Royal Oak

- \$100 million city civic complex, including city hall, police station, parking deck, park, site infrastructure, and office tower
- Consulting, Program Management/Owner's Representative Services

Reference Contact:

Mayor Michael Fournier
ccfournier@romi.gov | (248) 246-3463



City of Livonia

- \$300 million+ City Center Program, including City Hall; Police Station; Multiple Fire Stations; Civic Center Library; and Public Park & Infrastructure
- Consulting, Development Consulting, Program Management/Owner's Representative Services, Pre-Ballot Planning

Reference Contact:

Mayor Maureen Miller Brosnan
mbrosnan@livonia.gov | (734) 466-2200



West Bloomfield Fire Station

- \$5 million, 11,000 SF
- Program Management/Owner's Representative Services

Reference Contact:

Gregory Flynn, Fire Chief
West Bloomfield Fire Department
gflynn@wbtownship.org | (248) 409-1505

Relevant Experience Continued



Macomb County Jail

- \$228 million, 162,000 SF Central Intake and Assessment Center
- Cost Estimating/Budgeting, Program Management/Owner's Representative Services

Reference Contact:

Mark Deldin, Chief Deputy County Executive
deldin@macombgov.org | (586) 469-0419



Commerce Township Fire Station #3

- Design and Construction of a new 11,000 SF fire station to replace the existing Fire Station No. 3
- Program Management/Owner's Representative Services

Reference Contact:

Jim Dundas, Fire Chief
(248) 672-4096



West Bloomfield Police Station

- \$6.4 million, 15,300 SF in new construction, renovations, and additions
- Consulting, Space needs assessment, Program Management/Owner's Representative Services

Reference Contact:

Michael Patton, Police Chief
mpatton@wbpolice.org

Relevant Experience Continued



Grand Blanc Township

- \$28 million, new construction of Department of Public Works (DPW) and Fire Station
- Capital Planning Services, Design Services, Program Management/Owner's Representative Services

Reference contact:

Dennis R. Liimatta, Township Superintendent
Liimatta@twp.grand-blanc.mi.us | (810) 424-2682



The Hawk Farmington Hills Community Center

- \$27 Million, Renovations to 244,000 SF
- Program Management/Owner's Representative Services

Reference Contact:

Gary Mekjian, City Manager
Gmekjian@fhgov.com



City of Westland

- Fire Station - \$3 million, 5,600 SF | City Hall - \$10.6 million, 64,000 SF
- Financial Modeling, Site Selection, Space Programming, Site Due Diligence, Procurement of Professional Services, Program Management/Owner's Representative Services

Reference Contact:

Devin Adams, Controller – City of Westland Finance
dadams@cityofwestland.com
(734) 467-7920

Relevant Experience Continued



Novi Community School District

- \$257 million, renovations, upgrades, and addition of Early Childhood Education Center
- Facilities Condition Assessment, Facility Utilization Study, Pre-bond Planning, Program Management/Owner's Representative Services

Reference Contact:

Ben Mainka, Superintendent

benjamin.mainka@novik12.org | (248) 449-1204



Livonia Public Schools

- \$380 million, 2.8 million SF
- Renovations & additions of 27 facilities
- Facilities Condition Assessment, Facility Utilization Study, Pre-bond Planning, Program Management/Owner's Representative Services

Reference Contact:

Andrea Oquist, Superintendent

aoquist@livoniapublicschools.org | (734) 744-2589



Farmington Public Schools

- \$229 million, 1.9 million SF
- Facility Assessment, Enrollment Projections, Demographics, Pre-bond Planning, Program Management/Owner's Representative Services

Reference Contact:

Christopher Delgado, Superintendent

christopher.delgado@fpsk12.net | (248) 489-3338

Relevant Experience Continued

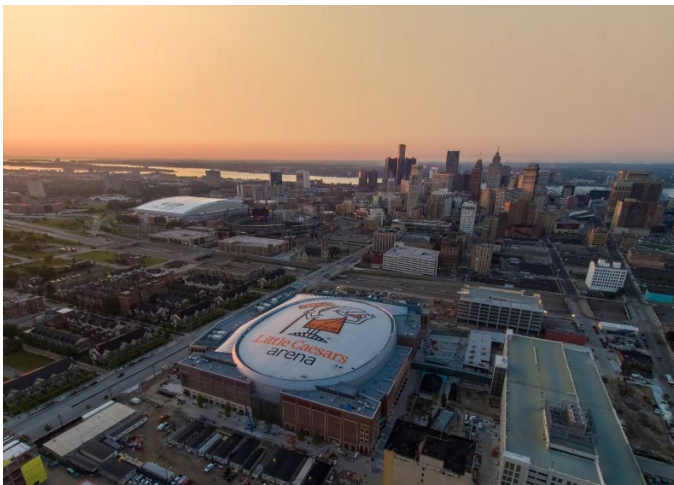


Hamilton County

- 20-year, \$3.2 billion infrastructure project
- Consent Decree Compliance, Capital Improvement Planning, Financial Controls & Analysis, Program Management/Owner's Representative Services

Reference Contact:

Jeffrey W. Aluotto, County Administrator
jeff.aluotto@hamilton-co.org | (513) 946-4436



Olympia Development of Michigan

- \$2+ billion; Little Caesars Arena & surrounding mixed-use & entertainment district development
- Master Planning, Development Consulting, Acquisition/Disposition, Program Management/Owner's Representative Services

Reference Contact:

Stefan P. Stration, Vice President of Development
Olympia Development of Michigan
stefan.stration@olydev.com | C: (313) 727-4150



Huntington Place

- West-side expansion program and capital infrastructure improvements
- Consulting, Program Management/Owner's Representative Services

Reference Contact:

Marilyn Lane, Board of Directors, Macomb County Delegate | lane1000@comcast.net
Jeff Abood, Board of Directors, Oakland County Delegate | jeff@aboodlaw.com

Relevant Experience Continued



Birmingham Public Schools

- \$260 million, Renovations, additions, & site work for 15 facilities
- Facility Assessment, Enrollment Projections, Demographics, Pre-bond Planning, Program Management Services

Reference Contact:

Dr. Embekka Roberson, Superintendent
eroberson@birmingham.k12.mi.us | (248) 203-3000



Walled Lake Consolidated School District

- \$250 million, 19 buildings totaling 2,470,528 SF
- Strategic Planning, Pupil Enrollment and Demographics, Real Estate Consulting, Program Management/Owner's Representative Services

Reference Contact:

Dr. Michael Lonze, Superintendent
MichaelLonze@wlcsd.org | (248) 956-2011



Detroit Public Schools Community District

- \$800 million, 2 new build High Schools, 3 new build PK-8, multiple building renovations, additions, & site work
- Capital and Facility Master Plan Implementation, Real Estate Consulting, Community Engagement, Program Management/Owner's Representative Services

Reference Contact:

Machion Jackson, Assistant Superintendent
machion.jackson@detroitk12.org | (313) 873-6532



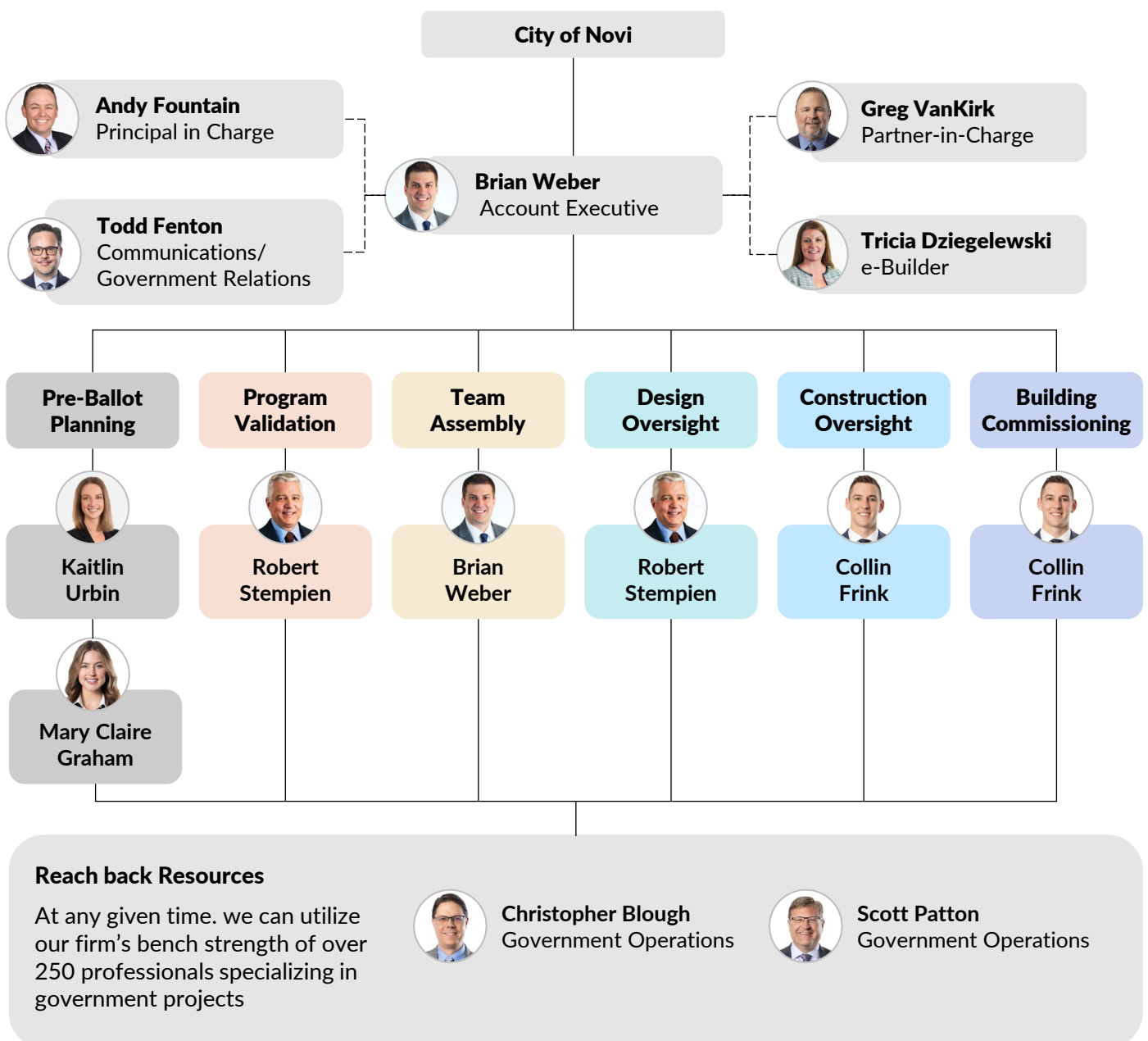
SECTION 3

Your Team

Team Organization

PMR's greatest asset is our people — not just their knowledge, but also their integrity and their commitment to our clients, staff, and communities. Our philosophy for staffing your engagement is simple: find the best people with the most relevant experience and balance the team with varied ways of thinking that complement one another.

We have structured our team to deliver the specialized knowledge and personal fit you deserve. Each person serves a necessary role on the engagement and is experienced in serving clients like you.



Our team



"Our clients sleep well at night knowing our team of experts is advocating on their behalf. Our expertise, teamwork, and independent approach will bring a significant return on your investment with us."

Gregory P. VanKirk, CPA

PARTNER

greg.vankirk@plantemoran.com | (248) 223-3395

Greg, partner at Plante Moran Realpoint, is responsible for leading the firm's corporate real estate and public sector program management practices. His expertise centers on providing strategic planning, process improvement, transaction management, and project management services to a wide range of clients, and he specializes in managing build-to-suit transactions. Greg's vision and leadership have resulted in the management of millions of square feet of real estate assignments.

Greg's broad professional background, including accounting, tax, finance, and consulting, provides his clients with highly technical expertise concerning strategic real estate opportunities. Current assignments include the development and implementation of programs that range in scope of \$10 million to \$500 million. As a result, Greg is extremely effective in analyzing project feasibility and delivering a comprehensive plan that takes a project from conception to completion.

Greg began his professional career in the accounting field with Plante Moran in 1992. His client responsibilities included managing audit and tax engagements for manufacturing companies, municipal and not-for-profit organizations.

Greg received his Bachelor of Arts degree in Accounting from Michigan State University. He is a certified public accountant and holds a Michigan Real Estate Broker's License.



Andy Fountain

PRINCIPAL

andy.fountain@plantemoran.com | (248) 603-5088

"Our proven process starts with comprehensive planning and ends with a successful project and a satisfied client."

With more than 20 years of experience in the construction and real estate market, Andy has the technical skills necessary to lead large capital programs to a successful close-out. He is known for his firm and fair approach to problem-solving, through which he strives to seek the best possible resolution for his clients.

As a principal with Plante Moran Realpoint (PMR), Andy has worked on a variety of multimillion-dollar capital improvement programs. His role as owner's representative is to guide clients through the process as they plan and execute their projects, helping them realize cost savings while meeting the needs of their organization.

Prior to joining PMR, Andy worked primarily in the K-12 and private sectors as both a construction manager and owner's representative. In these roles, Andy provided process refinement, budget development, evaluation and assessment, and project management services.

Andy has a B.A. in business management from Western Michigan University.



Brian Weber

SENIOR VICE PRESIDENT

brian.weber@plantemoran.com | (248) 675-9812

“As owner’s representatives, we are unbiased advocates for our clients’ visions from concept through completion of their projects.”

Brian is part of the program management team at Plante Moran Realpoint (PMR), responsible for overseeing multimillion-dollar capital improvement programs for K-12 school districts and municipalities. With 18 years of professional experience in the construction industry, Brian has the expertise to advise clients throughout a project’s entire life cycle, from feasibility and design through construction and owner occupancy.

Brian’s knowledge of project management processes and procedures includes project planning, budgeting and cost control, bid selection, contract management, schedule development and monitoring, and change management. He leverages this knowledge to set projects up for success, proactively adapt to challenges, and keep project teams focused on our clients’ vision and project success. Clients appreciate Brian’s dedication to ensuring the highest levels of quality while adhering to deadlines, specifications, and budgets.

Brian’s work with K-12 schools includes the construction of new facilities, expansions, and renovations to existing facilities as well as updating the infrastructure, site, athletic facilities, technology, and security in a way that supports districts’ ability to adapt to the ever-changing needs of the K-12 learning environment.

In the past, Brian worked at DeMaria Building Company, The Whiting-Turner Contracting Company, and Xcel Construction. Some of his notable projects include Michigan State University’s Food Processing Innovation Center, University of Michigan–Dearborn’s Natural Science Building, VA Saginaw Healthcare System improvements, the Rockville Town Center mixed-use development, and capital improvement programs at Detroit Medical Center, Beaumont Health, and Henry Ford Hospital’s main campuses.

Brian has a Bachelor of Science degree in construction management from Michigan State University. He is an elected member of PMR’s Strategic Leadership Council, a committee dedicated to championing leadership development and strategic initiatives within the firm.



Robert Stempien, AIA

SENIOR VICE PRESIDENT

robert.stempien@plantemoran.com | (248) 603-5252

"At Plante Moran Realpoint, we go the extra mile to understand and meet our clients' needs, exceeding their expectations at every turn."

Encompassing more than 40 years of design and construction experience, Robert has an understanding of project implementation from planning, programming, and budgeting to design and construction execution. Robert leverages his background in architecture and construction to provide clients with unique solutions leading to their project's success.

A recognized leader in the K-12, higher education, sports, municipal, and corporate markets, Robert is known for going the extra mile to understand and meet his clients' needs. This mentality helps him excel at large capital improvement projects that require high-level strategic planning and development. He has worked on projects totaling more than \$3.6 billion over his career serving clients.

He spent much of his career at Barton Malow, but prior to joining Plante Moran Realpoint, Robert was vice president at Ruby + Associates, the largest structural engineering firm in Michigan.

Robert, a registered architect in the state of Michigan, has a Master of Architecture and Bachelor of Architecture from the University of Michigan and a Bachelor of Business Administration from Lawrence Technological University. He is a member of the American Institute of Architects and the Village of Beverly Hills Planning Commission. He also served two four-year terms on the governor-appointed State Board of Architects and State Board of Engineers.



Collin Frink

VICE PRESIDENT

collin.frink@plantemoran.com | (248) 223-3144

"We bring a wealth of knowledge and apply a broad range of experiences to every interaction to make sure the client accomplishes everything they need throughout the life of a project."

As a vice president on the public sector team of Plante Moran Realpoint (PMR), Collin ensures clients' K-12 projects run efficiently and effectively and adhere to budget and schedule goals. Clients appreciate that Collin's priority is unparalleled client service, which he cultivates through open and honest communication.

Collin's nine years of construction industry experience gives him the insight, knowledge, and expertise needed to help clients make the most informed and effective project decisions. He joins PMR from The Boldt Company out of Wixom, Mich. He served as a project manager in the automotive and industrial groups, where he oversaw the successful completion of over \$80 million in projects for clients such as General Motors, Nestle, Georgia Pacific, and Rivian. His greatest accomplishment was the completion of a body shop addition without adding downtime to the client's production schedule and without interfering with their accelerated 24/7 workflows.

Collin graduated from Michigan State University with a Bachelor of Science in construction management.



Todd Fenton

VICE PRESIDENT

todd.fenton@plantemoran.com | (248) 223-3521

"I have witnessed firsthand, as a client, the impact that Plante Moran Realpoint's team of experts and consultants can bring to complex real estate projects from conception through completion. It is a tremendous privilege to be able to bring my years of public sector experience to Realpoint to help municipalities across the country achieve their development goals and make a transformational impact in their communities."

As a vice president at Plante Moran Realpoint (PMR), Todd brings more than 15 years of economic development and municipal experience to the public sector team. Todd utilizes his breadth of knowledge, insight, and understanding of economic and municipal development processes to assist clients in navigating development programs at the local level.

Todd joins PMR from the City of Royal Oak, Mich., where he served in various roles, including economic development manager, deputy city manager, and most recently, interim city manager. In his time with the City of Royal Oak, Todd oversaw \$100 million of transformational projects in Royal Oak's municipal campus, which entailed the construction of a new city hall, police station, parking structure, central park, and a 140,000-square-foot office building. This project was awarded an Impact Award from CREW Detroit. Prior to his time at the City of Royal Oak, Todd spent seven years with Wayne County in multiple economic development roles, including executive project manager for the Wayne County Land Bank and senior development officer for the Wayne County Economic Development Growth Engine.

Todd graduated from the University of Michigan with a bachelor's degree in English and Film & Video Studies. He received his juris doctorate cum laude from the University of Detroit Mercy School of Law. He is an active member of the State Bar of Michigan, a certified economic developer (CEcD) by the International Economic Development Council, and a certified economic development finance professional from Grow America.



"Our focus is to always give more than what is expected and to create such a strong connection to our client that we automatically know which service will fit the client's needs."

Tricia Dziegelewski

VICE PRESIDENT / SENIOR PROJECT COST ACCOUNTANT

tricia.dziegelewski@plantemoran.com | (248) 603-5276

Tricia is a senior project cost accountant manager at Planet Moran Realpoint with 30 years of experience in the accounting and project financial management fields. Tricia manages the project management team's project financial accounting, handling audits, cash flows, budgeting, and financial reporting for engagements with various healthcare and senior living facilities, religious and education institutions, and manufacturing companies.

Prior to joining Plante Moran Realpoint, Tricia was the senior project accountant at Jones Lang LaSalle for Beaumont Health Systems, where she served as the company's chief point of contact for all financial projects. She was responsible for a full range of accounting and project financial management functions, such as regulatory compliance, accounting cost control, asset accounting, and auditing.

Prior to that, she worked as the budget control manager for Barton Malow, a Fortune 500 company, developing and executing all financial accounting aspects for over \$4 billion in construction projects. She's also an expert in federal and state compliance, with experience auditing schools and hospitals for asset accounting.

Tricia has a Bachelor of Business Administration degree with an accounting focus from Walsh College of Business Administration and is certified in Michigan lien law.



Kaitlin Urbin

SENIOR CONSULTANT

Kaitlin.Urbin@plantemoran.com | (248) 223-3188

As a senior consultant for Plante Moran Realpoint's marketing team, Kaitlin brings more than five years of design and marketing communications experience across a wide range of media. Over the past three years at PMR, she has managed a number of successful school informational bond and sinking fund campaigns, including Woodhaven-Brownstown School District, Redford Union School District, Lakeview Schools District, DeWitt Public Schools, Warren Consolidated Schools, Southgate Community School District, Grosse Ile Township Schools, and Westwood Community Schools. As a designer, Kaitlin focuses on providing districts with unique and personalized graphics that not only inform the public on capital programs, but coordinates with current district branding.

Kaitlin graduated from Michigan State University with a Bachelor of Fine Arts degree in graphic design and a Bachelor of Arts degree in creative advertising with a concentration in art direction.



Mary Claire Graham

CONSULTANT

MaryClaire.Graham@plantemoran.com | (248) 603-5133

As a consultant for Plante Moran Realpoint's marketing team, Mary Claire joined in the summer of 2023 with a strong background in communication, sales, and marketing internships.

Over the course of being welcomed onto the team, she has assisted with informational bond campaigns for Westwood Community Schools and Van Buren Public Schools. Her writing skills highlight PMR's services and has accommodated advertising and sponsorship efforts for districts.

Mary Claire graduated from Michigan State University with a bachelor's degree in public relations and a bachelor's degree in sales and strategy with a concentration in advertising.



Christopher Blough

PRINCIPAL, PMP

Christopher.Blough@plantemoran.com | (248) 223-3209

Specialties:

*Data analytics,
technology consulting,
government*

As the public services delivery service line leader within Plante Moran's government technology and operations practice, Christopher advises leaders in America's fastest growing communities to deliver digital services for their permitting, licensing, and land development customers. In this role, he is privileged to lead cross-disciplinary teams of community planners, technologists, analytics experts, and experienced operations advisors. Together they equip growing communities to promote economic development and community vitality.

His 20 years of experience includes public service practice and consulting advisory roles serving county, municipal, utility, and special purpose districts. Clients retain his team to manage and accelerate their digital transformation by providing technology and digital strategy, business process transformation, technology planning and selection, vendor contract negotiation, and solution implementation advisory services.

Christopher specializes in elevating his clients' capacity to introduce and enhance their services involving land development, building and site construction permitting, business licensing, and public safety and health code compliance. He also collaborates with teams who design system and process integrations with revenue management, financial planning, geographic information systems, enterprise asset management, and customer information systems.

Christopher earned a B.S. in geography and earth sciences from Central Michigan University and an M.P.A. from Eastern Michigan University. He also has master certificates in IS/IT Project Management and IT Service Management from Villanova University.



Scott Patton

SENIOR MANAGER

Scott.Patton@plantemoran.com | (248) 223-3503

As the firm's government operations practice leader, Scott helps governments work better by focusing on how resources are organized, how processes are designed, and how technology can improve operations.

Specialties:

*Government, strategy,
technology consulting*

Scott enjoys helping government clients because it helps the people in communities and enriches their lives. Figuring out how to improve a process, how to restructure a department, or how to partner with a neighboring jurisdiction is like a puzzle, and he loves the excitement when the pieces start to fit together. Variety is another factor that makes Scott so dedicated to his career — each community is so unique. Scott works with major cities, small townships, state agencies, and everything in between.

Scott has worn many hats over the years and has experienced government as an internal practitioner, an external consultant, an elected policymaker, and as a resident. He remains active in his community by volunteering in a mixture of church and civic activities.



SECTION 4

Project Approach

Project Approach

Our approach to serving you

Plante Moran Realpoint is a comprehensive, full-service program management/owner's representative and real estate consulting firm delivering successful capital projects concept through completion. What this means is that we have a scope of services and resources that allow us to scale to fit your exact needs, even as those needs evolve.

From strategic planning and feasibility to execution and move management, our program management staff offer leadership that helps your projects integrate into a master real estate strategy that aligns with your overall business goals. We keep this strategy, and your goals, in the forefront of the project team's efforts throughout project execution.

This focus on you, the client, is part of our DNA. Our firm is built on a foundation of integrity and independence. We advocate for our clients at all times. As an unbiased program manager/owner's representative, we help projects stay on budget, on schedule, and on target with the plans our clients set forth. The advantage of our real estate consulting is clear: You can be sure we're always on your side and invested in your success.

Plante Moran Realpoint is the right choice for organizations who want a truly engaged partner with a breadth and depth of capabilities tempered by our "We care" culture.

-  Our financial and business acumen keeps us focused on the project's impact to your bottom line.
-  We know where to look for efficient and effective cost/time-saving opportunities.
-  Our deep bench pulls in the right resources when needed.
-  We have a fully transparent delivery model with strong internal controls.
-  We offer a single point of contact and process consistency.
-  We provide a positive rate of return on your investment with PMR.

The following pages illustrate our approach to serving YOU.

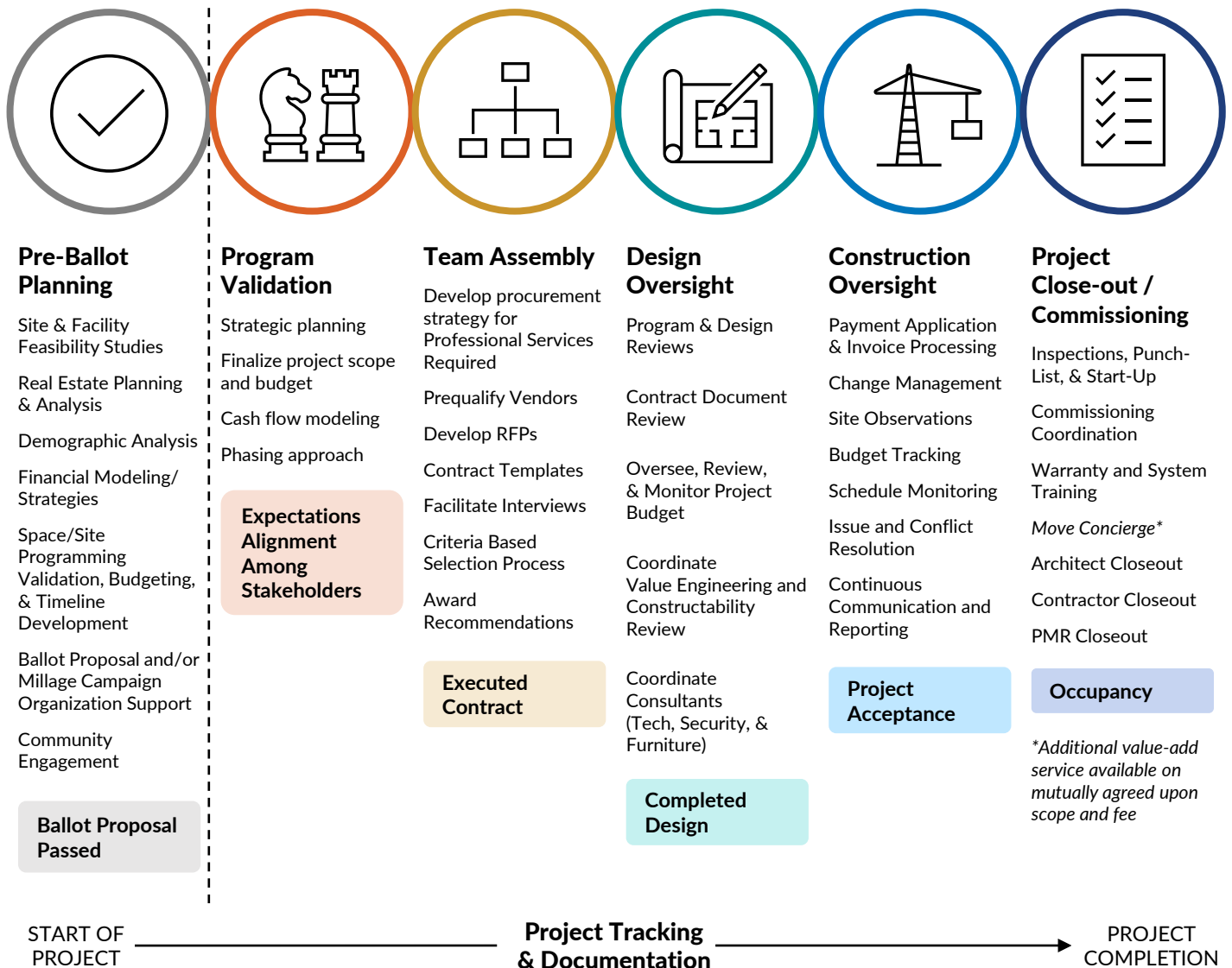
Our process

Owner's representation

Concept through completion, we solely advocate for you

There are hundreds of strategies to consider and decisions to be made for a large capital project. Our role is to bring process and knowledge together in order to assist you in navigating the project. Our professionals combine their multidisciplinary design, construction, and engineering backgrounds with decades of experience working on similar projects in your industry to confirm your project plan is properly implemented. Throughout the project, we sit on your side of the table and advocate for you.

Our services can include the following:



Project tracking & documentation

e-Builder - technology to keep it all a click away

Having accurate, real-time data is the cornerstone for all decision-making. Our e-Builder platform provides the opportunity to combine measurements of scope, schedule, and costs in a single integrated system. This allows clients to make informed decisions relating to accurate forecasts of project performance, which is an important aspect of project management.

Our online platform enables instant visibility for project managers, corporate leadership, and clients, helping to produce positive and predictable project outcomes while reducing risk. Using just this one system also eliminates redundancies, increases efficiency, and improves the accuracy and transparency of project details. It provides access to information and reports that project managers can leverage for their daily activities, but also increases confidence that stakeholder needs are being met through increased visibility.

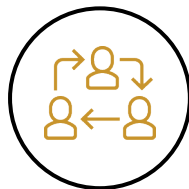
Faster access to information will also give project managers more time to focus on the projects and increase stakeholder involvement in the planning process, eliminating the risk of significant scope creep and owner-directed changes.

e-Builder benefits include:



Cloud-based access

Our online platform allows you access to every document, no matter where you are



Collaborative environment

Improve collaboration, communication, and accountability between your stakeholders and the project team



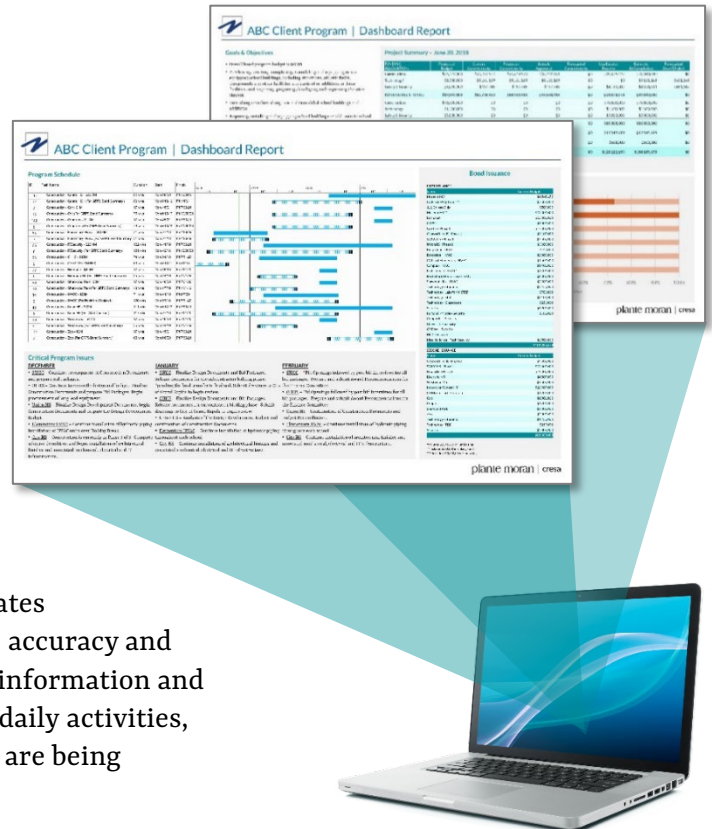
Cost management

Better decision-making with a complete database of your costs and change order data



User-friendly reporting

Total visibility into outstanding action items and your project data

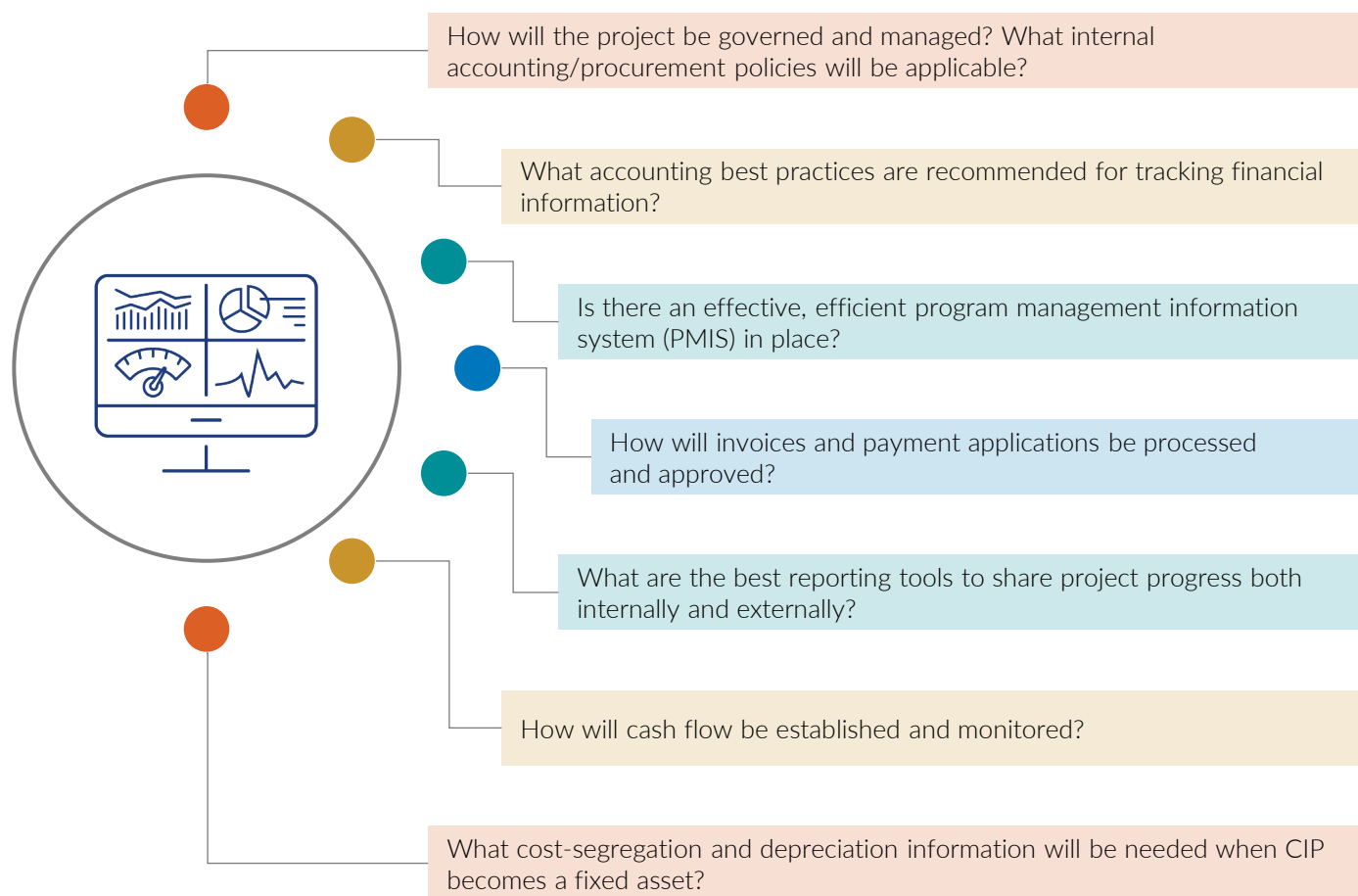


The value of an experienced project financial manager

Reliable, accurate, real-time financial information and analysis can be the difference between program success and setbacks. That's why PMR's project financial managers (PFMs) are a game changer — they are involved throughout the entire capital program process, from beginning planning stages through project closeout.

Managing a large capital program on your own can be a daunting task, but we are dedicated to helping you every step of the way. Acting as an extension of your accounting staff, our PFMs work alongside your internal teams to monitor the progress of your capital program, allowing your teams to continue running day-to-day operations without sacrificing resources.

Before your project even begins, our PFMs work with you to ask and help answer a handful of critical questions including:



With more than 25 years of experience, we bring knowledge, resources, values, and industry best practices to empower and enable your team and leadership to make smart decisions. In short: You can count on us to help handle the details while you focus on the big picture.

The value of a project control/accounting leader

PMR brings proven best practices to our clients, allowing them to take advantage of our 25 years of experience implementing billions in public programs. Our team plays an integral part in our success by providing our clients with specialized resources through each of the following elements of a capital program:

- ✓ Assist in establishing project governance structure and accounting procedures and controls
- ✓ Set up and monitor PMIS environment for owner and vendors with project budget, commitments, expenditures, and reporting
- ✓ Assist in developing processes that allow the entire project team to work efficiently and collaboratively to process payments, approve contracts and change orders, and complete many of the day-to-day challenges large programs face
- ✓ Assist in establishing project reporting guidelines and deliverables such as dashboards, cash flow, budget and commitments, and cost to complete reports
- ✓ Track project budget, commitments and actual costs through e-builder
- ✓ Establish document control to verify executed contracts, bonds, and insurance are on file
- ✓ Complete financial reconciliation of project commitments, actual spend, and cost to complete
- ✓ Reconcile pay applications, sworn statements, and waivers to promote subcontractors being paid timely and accurately
- ✓ Timely, accurate and complete financial closeout
- ✓ Continuously tracking cost escalation and inflation data across the construction industry

Pre-ballot planning

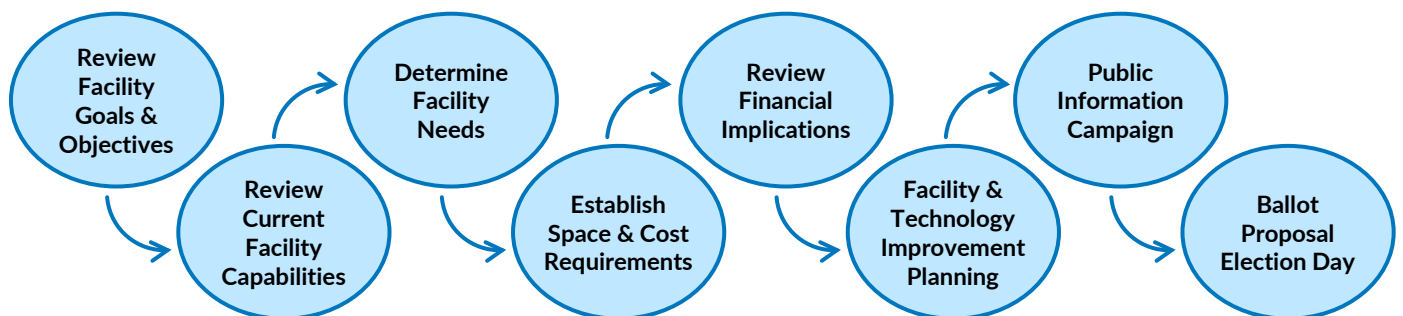
How we help you tell your story

Whether it's a city hall, public safety facility, or community center, your public buildings should be efficient, secure, and welcoming environments that serve the needs of your community. Maintaining this standard requires significant investment. As a trusted advisor to municipalities of all sizes, Plante Moran Realpoint has been assisting public sector clients with planning and executing ballot proposals for nearly 30 years. Effective planning with your administrative teams, coupled with strategic and timely communication to the public educating them about the importance and necessity of your ballot proposal, is crucial to your success.

Service offerings

- Site & Facility Feasibility Studies
- Real Estate Planning & Analysis
- Demographic Analysis
- Financial Modeling / Strategies
- Current Facility Use & Condition Assessment
- Space / Site Programming & Budgeting
- Informational Campaign Support
- Community Engagement

Proven ballot planning process



Approximate passage rate on first attempt for ballot proposal which PMR has provided pre-ballot planning services for

We understand how important the support and involvement of community members is to the City of Novi. Our team will assist in providing the means and the strategies that support a culture of honest and transparent public input. Outlined below are a few tactics we have seen successfully implemented prior to, during, and after successful completion of municipal capital programs:



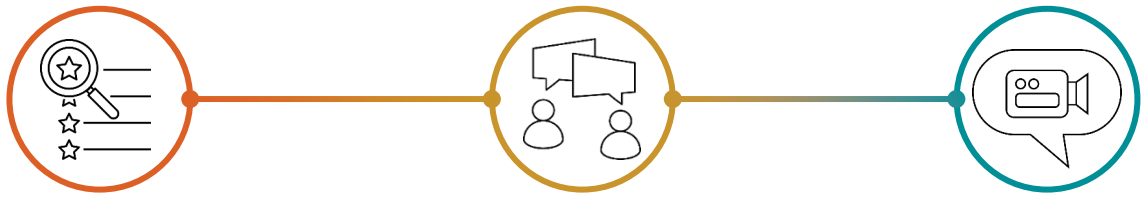
- Develop “taskforce” oversight bodies that can work together to discuss the municipality’s and community’s ideas, concerns, shared goals, and vision about how they want their public environments to look and function. These taskforces may include folks such as City council members, elected officials, administrators, union leaders, local business owners, political leaders and advocacy groups, minority advancement groups, religious leaders, and senior citizens.
- Outline, in a meaningful and clear way, program timelines, financial and nonfinancial components driving the direction of the program, and introductions to initiative leaders to “put a face” to the program.
- Create a fluid process of continuous input and engagement, not just a “one-time” or “one-meeting” approach, especially when “course corrections” are contemplated or needed.
- Incorporate your administrators’ and staff professional experience as well as community input into decisions, as appropriate.
 - Utilize surveys and hold multiple meetings across various channels, including in person and online.
 - At the City level, create a “Blue Ribbon Committee” to create opportunities for residents to have representation on decision-making throughout the program development process.

We help you keep your community educated and informed

Large capital programs don't just impact municipal workers; they also have an impact on the community as a whole. As such, the community should be involved every step of the way from inspiration to implementation.

Plante Moran Realpoint engages, informs, and reports your community by instituting the following best practices:

We engage your community with:



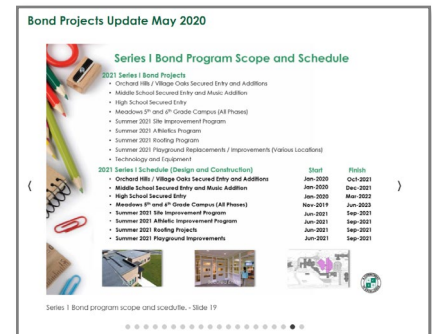
Timely, thoughtful surveys regarding work complete and work to be done

Focus groups to learn more about needs, vision, and priorities

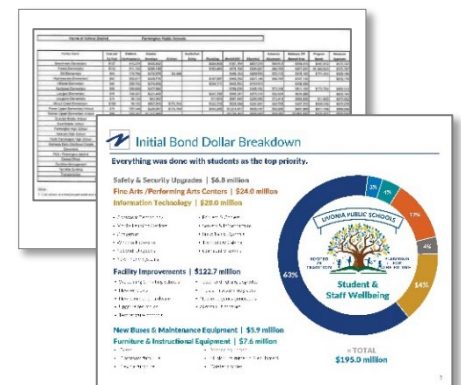
Live, broadcasted presentations showcasing program progress

Web-based communications on the unique needs of your municipality. Deliverables and initiatives may include:

- ✓ Community presentations
- ✓ Focus group, surveys, reports, and presentations
- ✓ Virtual Q&A sessions utilized through platforms such as Teams, Zoom, etc.
- ✓ Contact forms on municipal website for 24/7 access for community to submit questions directly to leadership
- ✓ Social media strategy and profile creation
- ✓ Presentation of up-to-the-minute information via web-based PMIS platform



Example of website landing page for communication.



Ballot issue and/or millage campaign organization support

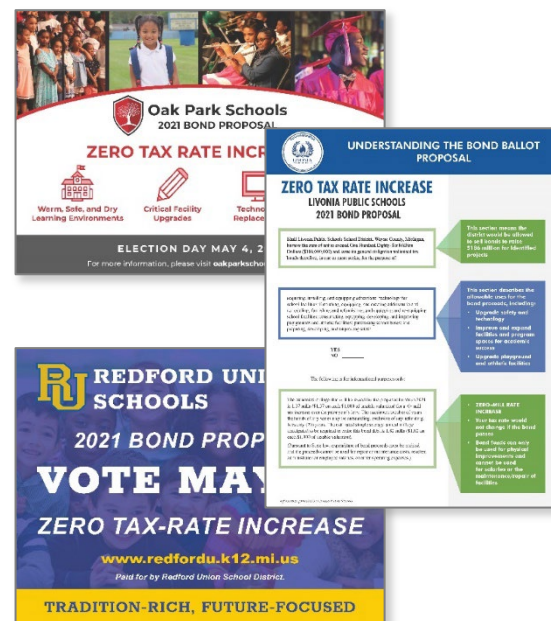
Ballot information campaign support

Ballot programs can have a tremendous impact on municipalities. Communicating to the public and to City administration teams about the importance and necessity of your ballot proposal is a crucial component to your success. Our experienced marketing staff will meet with your committee regularly to confirm every detail is attended to. We integrate with your communications staff to bring resources, structure, and support to help you accomplish the many tasks needed for a successful bond information campaign.

Our proven process has consistently yielded positive results for dozens of public organizations and billions in bond campaigns.

Our team can help with your ballot campaign

- Campaign messaging and theme development
- Letters to the public
- Brochures
- Lawn signs
- Press Releases
- Outdoor signage
- Frequently asked questions
- Campaign calendar
- Breakdown of ballot language
- Postcards
- Posters
- 4 x 6 cards for staff
- Topical Flyers
- Community flyers
- Absentee letters
- Social media/web
- Presentations



Campaign materials

Our team provides unparalleled ballot information campaign planning and execution coordination services. From creating a theme that will resonate with the community, to providing a timeline on which messages are most effective when and to whom, we help you navigate the complexities leading up to election day.

Program validation

Strategic planning

Evaluation & programming

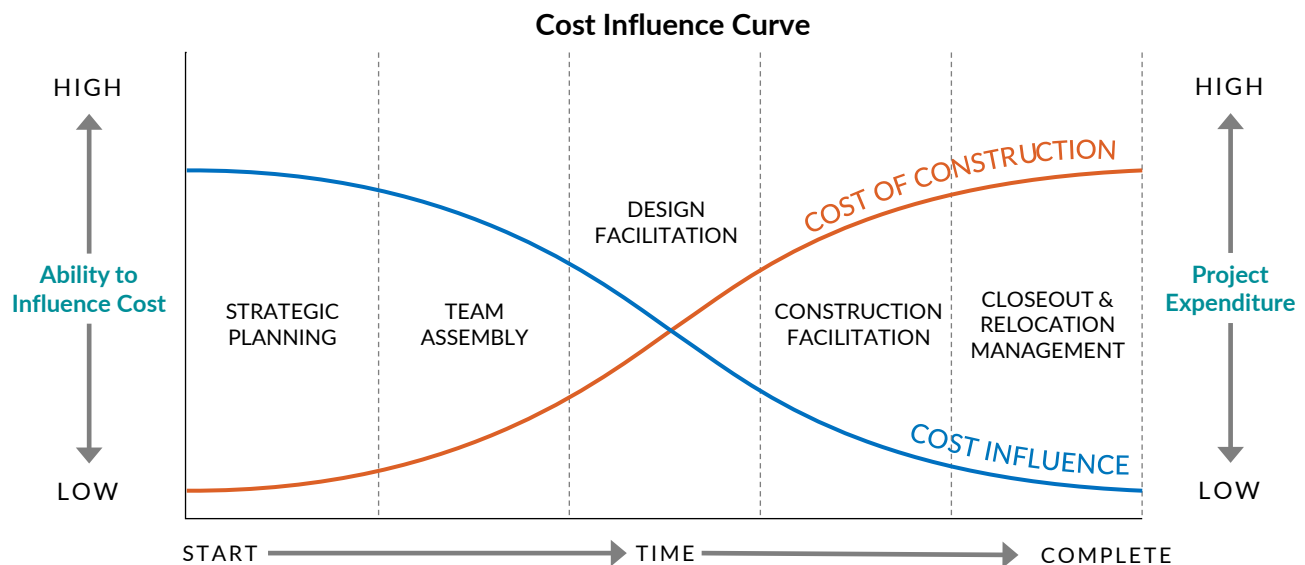
PMR will review your organization's long-term facility requirements and develop an updated space and site program and plan. By gaining a thorough understanding of your objectives, requirements, standards, budgets, and schedules we test for the validity and compatibility of your program. The space and site program and plan identify the correlation between facility, site needs, cost parameters, timetables, and funding mechanisms to help achieve your goals and objectives.

Deliverables:

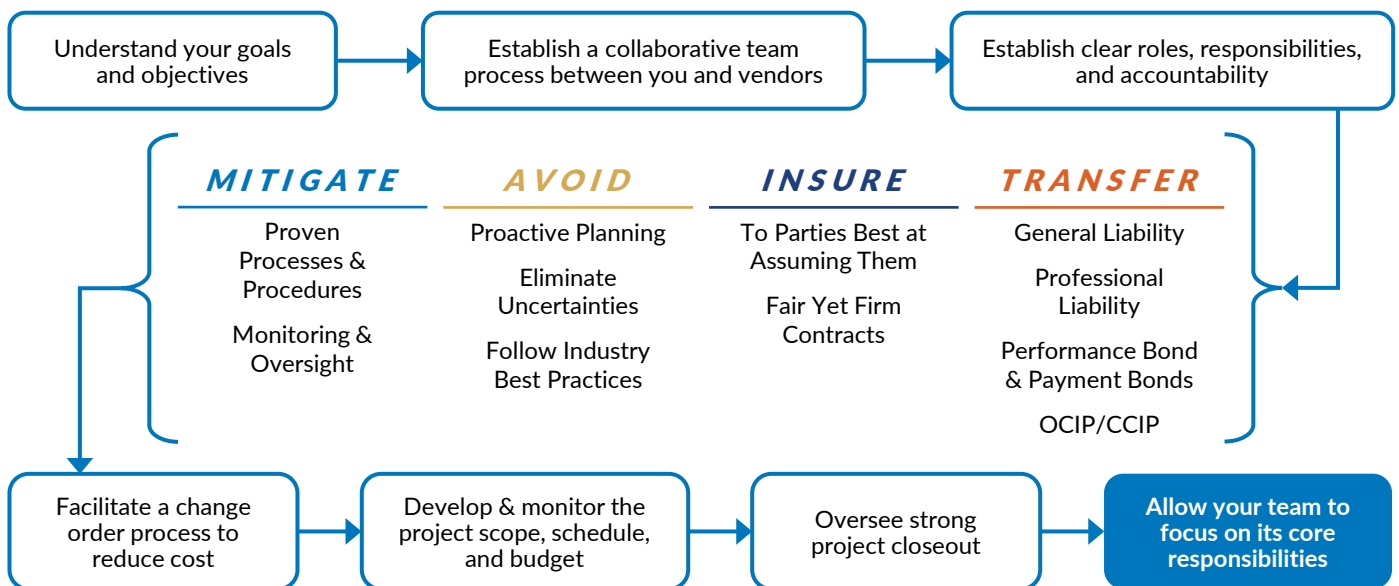
- ✓ Needs Analysis
- ✓ Space/Site Program
- ✓ Site Due Diligence Analysis
- ✓ Preliminary Budgets
- ✓ Preliminary Milestone Scheduling
- ✓ Financing Considerations
- ✓ Project Description

Our role in managing costs and protecting your investment

While organizations who engage PMR prior to engaging architects, contractors, and vendors have the most opportunity for a successful project, we are a valued advocate sitting on your side of the table throughout all phases of the project to help you manage risk and costs and maximize your return on investment.



Our process to mitigating risk



Budgeting & cost control

Cost benchmarks on large construction projects

A unique benefit offered by PMR is the utilization of our cost benchmark database that consists of more than 400 completed projects to validate initial budgets.

A process to successfully manage costs

- ✓ Establishing a realistic initial program budget with reasonable project contingencies.
- ✓ Facilitating design process to minimize the introduction of added scope. Overseeing budget reviews at each design milestone.
- ✓ Helping clients achieve a project schedule that is aggressive yet realistic, and has a well-planned phasing sequence.
- ✓ Monitoring the status of the project, asking questions of the design/construction management team to confirm there are no “holes” in the project scope with respect to construction items, phasing costs, and furniture, fixture, and equipment coordination.
- ✓ Performing a review of proposed changes. Always ask: is this legitimate? What can be done as a “no cost” or lower cost solution? And explore viable alternate solutions that might minimize costs.
- ✓ Updating actual costs vs. budgeted costs to avoid any financial “surprises”.
- ✓ Facilitating the implementation of owner provided FF&E elements as diligently as the design and construction costs are managed.

Team assembly

Architect/engineer, construction management, & vendor procurement

A selection process based on qualitative and quantitative data to provide the best value to the City. PMR has a detailed process for architect/engineer, contractor and other vendor selection and negotiation. Our approach utilizes a criteria-based selection process that is multi-step involving qualifications and fee proposals.

Negotiating contract terms

Your legal counsel will assist you with contract language but will not typically advise on business terms. PMR understands the market for the myriad services involved in a capital facilities program. We will bring this knowledge and experience of what is fair and reasonable, gained across dozens of negotiations, to your program. This single factor alone can save you hundreds of thousands of dollars in fees and risk exposure. Further, we can apply this rationality to your benefit directly through negotiations with preferred firms.

Identify experienced contractors – Other Owner Direct Vendors

Step One - Qualifications is a process to first determine vendors have the necessary firm and individual experiences suited for the particular project. We also review current workload, available resources, and financial strength of the firm. Data received is put into our evaluation format and the selection criteria rolls up into a summary spreadsheet for comparison.

A proprietary selection process with weighted selection criteria

Step Two – Firms that meet the qualifications are invited to submit their proposal on project specific requirements, costs, and fees. This process includes providing the project specific information and schedule, insurance requirements. Our process requires the proposer to provide detailed staffing, schedule, and cost worksheets as defined by your customized contract, general conditions and terms, and conditions necessary for each project or group of projects.

They are then required to complete our summary of hours by staff member worksheet, entering the estimated hours for each team member. The worksheet will summarize the total hours and costs.

Team selection

The next step is to complete the support worksheet that provides a category cost allocation for: equipment and material, labor, trade costs, bonds, and insurance. The Summary worksheet also includes cells for reimbursable costs and overhead and profit.

Architect/engineer: A criteria-based selection process

Subject to applicable competitive bidding requirements, PMR solicits only prequalified architecture and engineering firms to bring experienced and appropriate firms to the Request for Proposal process. We create and issue all Architectural/Engineering Requests for Proposals tailored to each specific assignment. We also assist our clients with short-listing and scheduling interviews with selected firms and facilitate the negotiation of the Architectural/Engineering contract.

Deliverables:

- ✓ If applicable, prequalification of architectural and engineering firms
- ✓ Create architectural and engineering Request for Proposal
- ✓ Analyze architecture and engineering bids for client review
- ✓ Prepare short list and interview candidates
- ✓ Assist the client in selecting the appropriate architecture and engineering firms
- ✓ Assist in negotiating strong but fair contract terms

Contractor: A selection process based on qualitative & quantitative data

PMR can help you determine the best project delivery method for your project and then solicit prequalified contractors to bring the most experienced and appropriate firms to the Request for Proposal process. We create and issue all construction Requests for Proposals tailored to each specific assignment. We also assist our clients with short-listing and scheduling interviews with selected firms and facilitate the negotiation of the construction contract.

Deliverables:

- ✓ Subject to applicable competitive bidding requirements, prequalification of construction companies
- ✓ Create Request for Proposal for selected contracting method
- ✓ Analyze bids for client review
- ✓ Prepare short list and facilitate interview of candidates
- ✓ Assist the client in selecting the appropriate construction firm
- ✓ Negotiate strong but fair contract terms

Additional vendors

PMR can assist clients in selecting other appropriate vendors, such as:

- ✓ **Construction Testing**
- ✓ **Commissioning**
- ✓ **Furniture & Fixtures**
- ✓ **Security**
- ✓ **Technology**
- ✓ **Material Testing**

Strong contract language: reduces risk, improves accountability



Separate, tailored contracts for architects & constructors

Our extensive experience in contract negotiations and custom-tailored AIA Documents provide provisions and conditions within the contract favorable to your organization, reducing your exposure to design and construction issues, and directing your financial resources towards more capital costs and less soft costs.

The contracts would also identify the proposed teams from each firm to assist you receive the services from top-level principals and associates specializing in municipal education projects.

Strong but fair contract language

Our project specific contract language and general conditions are also included for the firm's review and acceptance as a condition of the negotiating process. **Our amended provisions in the AIA standard form of agreements and general conditions is designed to transfer and mitigate owner risk by requiring much greater A/E & CM accountability.** Having the firms agree to the terms and conditions at this early step streamlines the negotiating process.

Design oversight

PMR's multidisciplinary team of professionals including team members with backgrounds in architecture and engineering will review and the schematic design and design development drawings relative to your project objectives. During the design and construction document phase, PMR's team will visit with the architect regularly to monitor their progress to enable the architect to continue to make good design progress toward the project objectives. We will also coordinate budget verification, construction sequencing, and phasing, as well as implement value engineering reviews in conjunction with the construction management team.

Key elements to successfully managing the design process include:

- ✓ Work with owner to set up informal work teams for direction and approval
- ✓ Review design drawings for any potential phasing constraints
- ✓ Define any missing design data needed, and define the applicable dates such data will be required
- ✓ Define process for document review, constructability input, and budget verification moving forward
- ✓ Promote deliverables being issued on time and to the level of completeness required
- ✓ Review drawing for alignment with owner's intent
- ✓ Assist in obtaining local and state approvals



Cost Information

The following cost information and general projections will be prepared for the City.

- Cost to realign staff and make improvements to the buildings to handle the realignment. This cost information will include the following:
 - » Prioritized Renovation Costs
 - » Furniture Costs (as applicable)
 - » Technology Costs (as applicable)
 - » Professional Services
 - » Soft Costs (i.e. insurance)
- The objective will be to provide the City a complete project cost for each alternative identified.

Schedule

- As part of the pre-ballot planning process, PMR will work with the City to establish a realistic and achievable program timeline, which will include a timeline for the ballot proposal and implementation of the program.

SAMPLE COST INFORMATION SHEET						
		Specification Factor =	1.000	Cost Data		
		Geographic Factor =	1.000	Detroit, MI		
		Cost Escalation Factor =	1.000	4th Quarter 2013		
Line No.	Program Area	Area Required	Unit	No. of Units Required	Base Unit Cost (\$)	Effective Program Area Cost (\$)
2	Interior Building Support Office / Court Room Renovations					
3	Demolition	73,000	SF	1	\$4.00	\$292,000
4	Rough Framing / Wall Partitions / Drywall	73,000	SF	1	\$5.00	\$365,000
5	Ceilings / Acoustical Tile	73,000	SF	1	\$5.00	\$365,000
6	Finishes - Office Mid Level - Flooring/Painting	31,500	SF	1	\$12.00	\$378,000
7	Finishes - Court High Level - Flooring/Painting	42,500	SF	1	\$21.00	\$892,500
8	Glass / Doors / Hardware	73,000	SF	1	\$5.00	\$365,000
9	Mechanical	73,000	SF	1	\$12.00	\$876,000
10	Electrical - includes Higher End Fixtures	73,000	SF	1	\$13.00	\$949,000
11	Plumbing	73,000	SF	1	\$8.00	\$584,000
12	Fire Protection	73,000	SF	1	\$5.00	\$365,000
13	FA / Low Voltage / Cable & Pathway	73,000	SF	1	\$5.00	\$365,000
14	Miscellaneous Renovations - firs 2-4 (allowance)	88,400	SF	1	\$5.00	\$442,000
14	Subtotal				\$93.00	\$6,067,500
15						
16	Building Renovation Hard Cost Project Sub Total					
17						\$ 6,067,500
18						
19	Building Renovation Hard Cost Project Sub Total					
20						\$ 6,067,500
21	Design Project Contingency:	5.00% Of Building & Site Budget				\$303,375
22	Contractors General Conditions, Support Services and Fee	9.00% Of Building & Site Budget				\$456,075
23	Performance & Payment Bonds	1.00% Of Building & Site Budget				\$50,675
24	Architect/Engineer Fees and Costs:	7.00% Of Building & Site Budget				\$344,725
25						
26	BUILDING AND SITE GRAND TOTAL:					
27	Loose Furnishing and Equipment Cost:	\$15 Per sq. ft. of renovated space				\$ 1,095,000
28	Building Permits & Inspection Fees:	1.25% Of Building & Site Budget				\$ 75,844
29	Program Manager	1.50% Of Building & Site Budget				\$ 91,013
30	Site Acquisition:	0.00 Of Building & Site Budget				\$0
31	PROJECT TOTAL:					
32	Financing & Capitalized Interest:	of Project Total				\$0
33	Legal & Accounting Costs & Fees, etc:	of Project Total				\$0
34	Marketing Costs	of Project Total				\$0
35	PROJECT GRAND TOTAL:					
					\$121.75	\$ 8,887,945
ASSUMPTIONS						
This estimate is based on a total gut and replacement of floors 1st, 5th, and 6th only - per space program						
Existing floors 2-4 are to remain as is - only miscellaneous renovations are figured as an allowance						
Miscellaneous renovations to floors 2-4 refers to work that may be incurred due to construction on floors 1, 5 and 6						
Demolition assumes vertical material handling (exterior chute)						
GC % assumes fire watch, security and vertical transport						
No exterior facade work is planned for within this budget						
All existing infrastructure M/E/P main systems are to remain as is - this estimate assumes that rework & relocation of existing branch systems only						
This conceptual proposal includes a mid & high level finish plan for all interior as indicated						

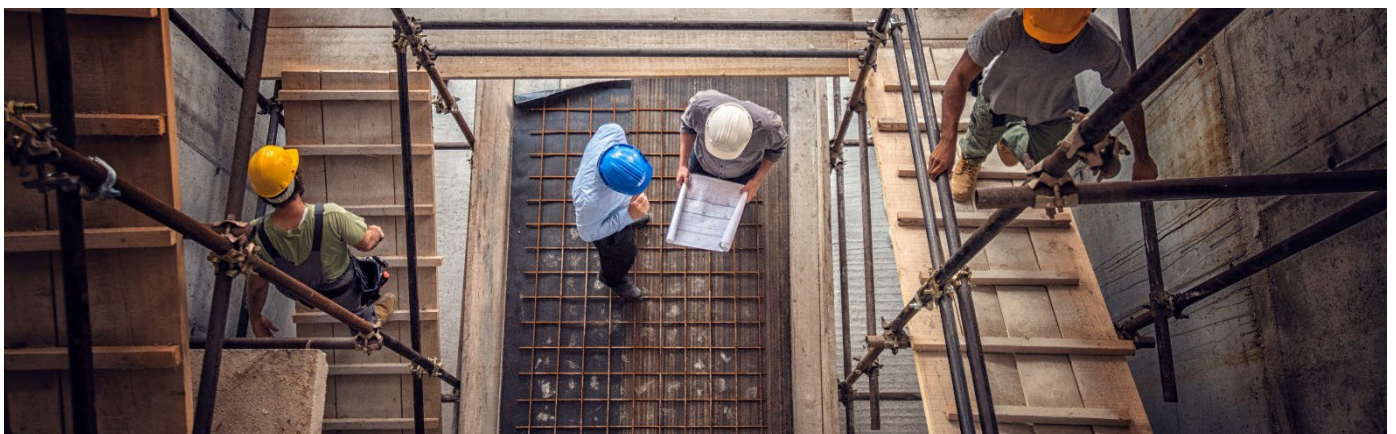
Construction oversight

An independent advocate sitting on your side of the table

As a program evolves into the construction phase, the timely flow of information becomes critical. As questions and/or field issues arise, they must be addressed. Our team becomes the hub in this process. With constant communication and a continued clear understanding of all project issues, we effectively facilitate the process to keep your schedule on track. We will also review the project as it is constructed to promote the scheduled progress remains on track, the work installed is in conformance to the contract documents, and that the necessary inspections are performed.

Key elements to effective construction oversight include:

- ✓ Maintaining strong information flow between design and construction team
- ✓ Advise the team in making good decisions with respect to field issue resolutions
- ✓ Assist in promoting all work is being installed per the contract requirements, the required independent testing is being performed, and permit inspections are occurring as needed
- ✓ Facilitating the change management process to promote not only that costs submitted are fair and equitable, but also that final costs for any particular event reflect the best overall solution to the problem
- ✓ Review schedule updates and verify work is progressing as required. If not, assist the Construction Manager in defining and implementing an acceptable correction plan
- ✓ Assisting with all owner furnished elements in a timely manner as to not delay the construction trade work
- ✓ Facilitate all stakeholder relationships during the process which involves the project team, design team, construction management team, and all other suppliers and vendors engaged in the project



Projects that finish on budget are proactively managed

Periodic budget reconciliations to minimize “scope creep”

Once the initial team buy-in is obtained, providing periodic budget reconciliations to minimize “scope creep” during the design phase is essential to controlling budgets for all program elements. Experienced field management along with clear and complete design documents will help to manage costs during construction. PMR will lead this effort and will begin this process by validating all of the initial budget assumptions to determine if it is adequate for each element. We will ask questions, challenge assumptions, validate findings, and then refine the program budget as needed. Establishing accurate project budgets that are responsive to the project schedule and intended scope is extremely important on any project and is a major focus of our management approach.

Project cost accounting & budget tracking processes

PMR will utilize our project cost accounting and budget tracking processes for all aspects of the program and projects, including fees and soft costs, furniture and equipment, and construction costs that can easily be customized to your specific requirements. The reports will allow you to review the status of all budget line items, its committed, pending, and potential costs supplemented by a detailed breakdown of how each program dollar has been utilized.

Project close-out/Commissioning

Project close-out

Strong contract terms leverages timely close-out

Plante Moran Realpoint has a very specific process for project close-out and incorporates the requirements into our customized contract language between the owner and contractor at the start of the project.

Costs associated with completing requirements

We have assigned costs associated with completing the requirements for project close-out that are incorporated into the architect's AND contractor's schedule of values and listed in the Application for Payment. These are scheduled values and not part of retention and include:

As-Built (Record Drawings)	1% of contract value
Training and O&M Manuals	1% of contract value
Attic Stock Materials	0.5% of contract value
Documents	0.5% of contract value

This provides PMR and your organization with leverage in having the contractors diligently manage the close-out process.

Defined process for project close-out

It is easy for contractors and vendors to forget that a strong project completion is just as important as a strong project start. By entering into close-out planning at the beginning of the project, continuing dialogue throughout the construction phase, and diligently managing the close-out process, we will require both the Construction Manager and the various Furniture, Fixture, and Equipment vendors to quickly complete their required close-out activities and provide all of the necessary documentation required at the completion of your project.

Key elements to effective project close-out and commissioning include:

- | | |
|--|--|
| ✓ Defining process early in the construction process | ✓ Reviewing all submitted documentation for completeness |
| ✓ Defining all required O&M and Commissioning Documentation | ✓ Promoting all final inspection certificates are received |
| ✓ Promoting all required Owner training is performed at the appropriate time | ✓ Reviewing all final billing paperwork is in order |
| ✓ Supporting Punch list work is performed diligently | ✓ Contractor lien releases, sworn statements, and bond release |



SECTION 5

Adding Value

Adding Value

We understand municipalities

We specialize in partnering with mission-driven, consensus decision-making bodies. With extensive experience overseeing billions of dollars in public projects, we understand the unique challenges and opportunities these initiatives present. Leveraging our background and industry insight, we empower our clients to make timely and effective decisions — avoiding delays, escalated costs, and potential headaches. Below are examples of how we maximize our clients' return on investment with us:

Return on Investment (ROI) Strategic Approaches:

Client Example:



DTE New Business Early Consultation Program

Allows DTE Planners and Engineers to engage in projects in the early concept and design phases. This also allows us to work with the developer and their Design Team while in the due diligence period.

\$75M Public Sector Capital Program

Expedited the procurement of long lead equipment to complete projects on time, avoiding added soft costs, including staffing and temporary facilities. (~\$10K-\$15K per month)

More accurate information in base bid documents avoided change orders (~\$200K)



Cost Escalation Avoidance

Establish a program schedule to complete the project in an effective and efficient manner. Approaches include pre-purchase of long-lead equipment, timing of the design/bidding process and balancing construction schedules and phasing plans to optimize with supervision requirements.

\$200M Public Sector Capital Program

Bid timing and outreach play a critical role in participation on bid day. Limited coverage in bid categories and late bidding can negatively affect pricing. (~\$1.25M)

Review of construction schedule and phasing plans to pre-purchase long-lead equipment and optimize staffing plans (~\$9M)



Design Approach

Potential to accelerate design + construction

- Design + Prime approach could reduce 6%-8% in soft costs
- Multiple Bid Packages

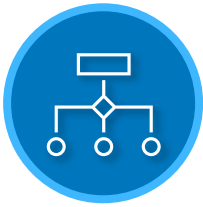
\$5.5M Public Sector Capital Program

Design + Prime approach: building demo/site clearing & prep was a design prime to avoid added CM costs (~\$50K)

Multiple bid packages allowed early design, procurement, and construction to take place avoiding added staffing and soft costs. (~\$250K).

Return on Investment (ROI) Strategic Approaches:

Client Example:



Procurement Approach

Working with client's legal counsel to structure proposed contracts, including:

- Defining "Cost of Work"
- Defining Staffing and General Conditions
- Defining Contingencies and Allowances

\$345M Public Sector Capital Program

Reviewed CM Costs and Fees (~\$6M)

Restructured AE Assignments (~\$3M)

Alignment of "Cost of Work" with CM/AE scopes (~\$750K)



Quality Review

- PMR Team of professionals (architect, construction, finance) provide independent checks and balances
- Drawings, specifications, and schedule reviews
- Financial oversight of all contracts and change orders.

\$200M Public Sector Capital Program

Initial project design was reviewed and reduced by 25% without losing programming. (~\$5M)

Review of projects to isolate scope creep items as bid alternates to help budget alignment (~\$1M)

Review accuracy and scope of change orders. (~\$200K)

Additional services for consideration (not part of proposed scope)

Move concierge

Avoiding disruptions to your organization

The relocation process must be seamless and transparent to your daily operations. Plante Moran Realpoint has extensive experience relocating organizations and uses a proven process which time and time again yields successful results.

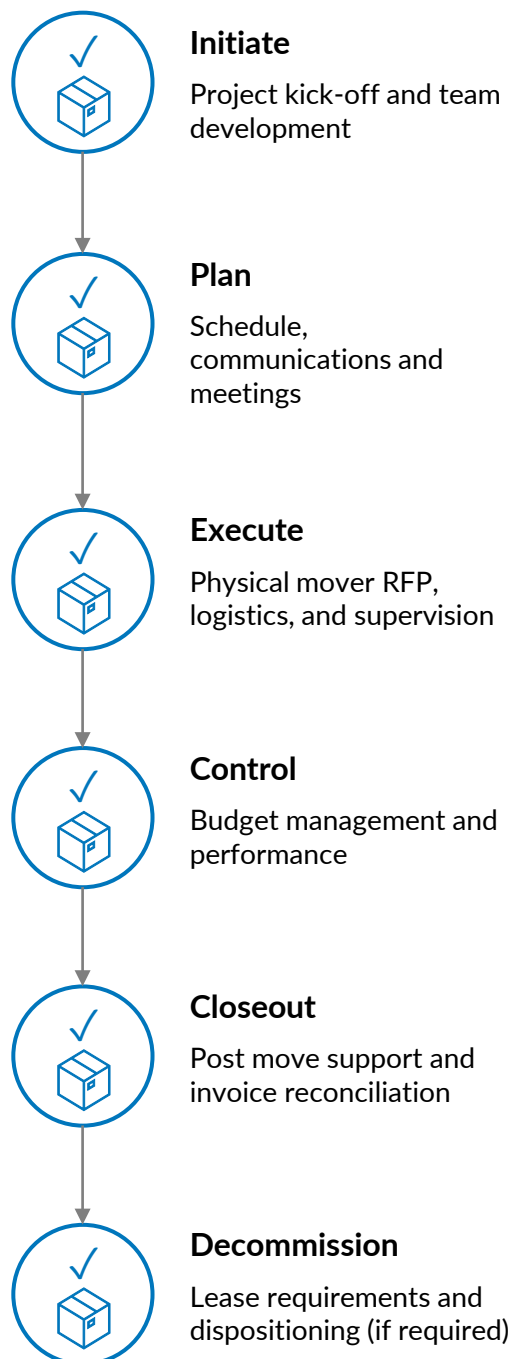
A proven process & leadership for your move

- Develop and coordinate an occupancy logistics plan and schedule that will outline the methods, processes, procedures, and timeline to successfully carry out the relocation of content and equipment
- Develop and execute a staff communications plan
- Develop evaluation and relocation plan for:
 - Furniture
 - Confidential Files
 - Technology
 - Equipment
- Developing and implementing recommendations for storage
- Developing and implementing recommendations for disposal of unneeded assets through a purge or recycle process
- Development of and solicitation of a Physical Move RFP
- Coordinate all sub-contractors (i.e. physical and rigging companies)

Accountability measures

Accountability measures include pre-move checklists and site visits to promote that all items are coded correctly and clearly identified. During move times, supervision is provided to address any issues that may come up. Upon completion, a post-move checklist is reviewed and site visits conducted prior to the start of staff work.

Preparation and strategy is key



Highest & best use analysis

Drive real estate development decisions with data & fieldwork

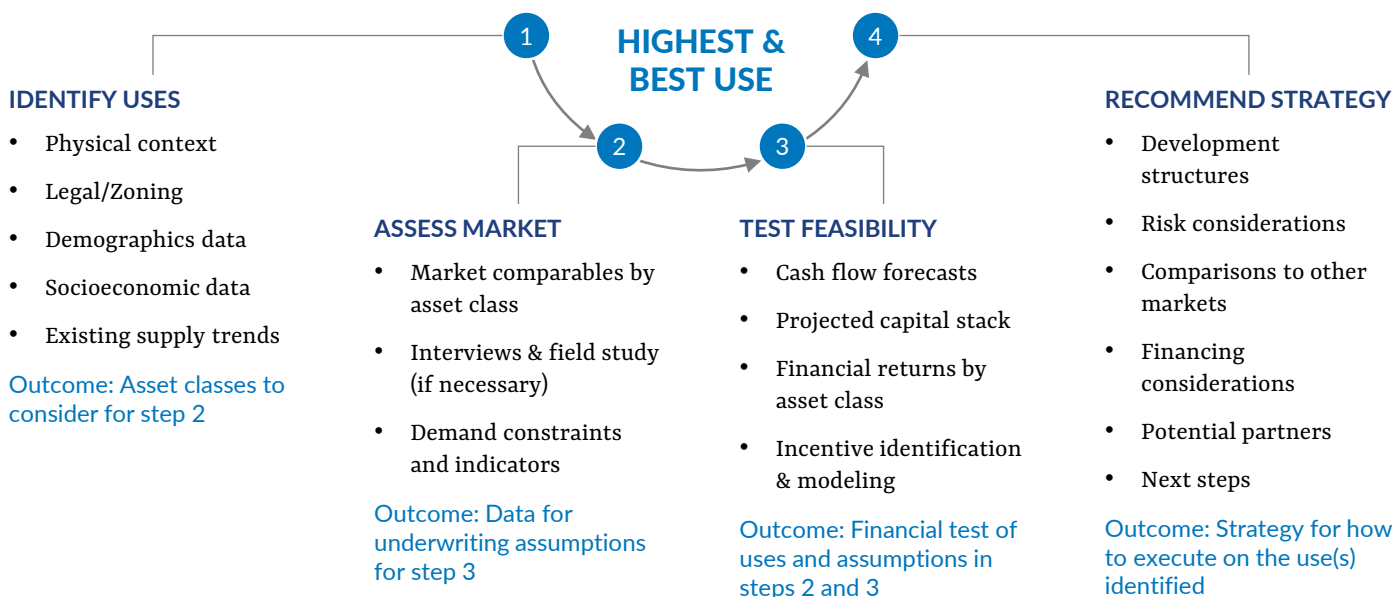
Underutilized buildings and land are ripe for real estate development, but not all uses are feasible for your site or market. By assessing the physical, legal, and market opportunities and constraints on your site or in your market, Plante Moran Realpoint's highest and best use analysis helps government, institutional, and private real estate owners understand the investment potential for their sites and determine a strategy for implementation based on the determined use.

Questions we help you answer

- What buildings are we utilizing today and what do we need for the future?
- Is there underutilized property that can drive more economic development in the community?
- What is physically and financially feasible?
- How can we attract private developers to our project?
- Can I structure a project with economic gaps or other constraints to provide market returns?
- Who in the market can we partner with to do these developments?
- How do I manage the development of and implement the project?

A holistic analysis of real estate use potential

What sets our analysis apart is the experience of our team, the comprehensive nature of our research, and our ability to tailor the study to fit your needs. Our analysis generally includes the activities described in the graphic below, but as needed, we can include further scrutiny on demand forecasting, field studies, additional financial modeling, and exploration of different sensitivities or return metrics.



Our approach to incentive procurement

PMR Incentive Consulting Services

Local, state, and federal incentives are effective tools to maximize returns within real estate investment and development projects. Understanding the complex structure and application process required for each incentive program can be a major challenge because incentives require specialized attention, experience, and relationships for successful execution.

Our team offers the experience you need to take advantage of the many available incentive programs, with a proven approach that simplifies the complexities of the incentive procurement process. We can help you maximize incentives to make projects feasible and achieve desired return-on-investment targets.

Incentive Experience

- ✓ Opportunity Zones
- ✓ Federal, State, & Local Low-Interest Loan & Grant Programs
- ✓ New Market Tax Credits
- ✓ Historic Tax Credits
- ✓ Property Tax Abatements
- ✓ Low-Income-Housing-Tax-Credits (“LIHTC”)
- ✓ Tax Increment Financing (“TIF”)
- ✓ Community Land Trusts

Incentive Procurement Project Examples

- ✓ The District Detroit – \$795+ Million in Low-Interest Loans, Infrastructure Grants, TIF & Tax Abatement Incentives
- ✓ The Future of Health – \$285+ Million in TIF & Tax Abatement Incentives
- ✓ Henry St Redevelopment – 4% & 9% LIHTC Awards, Historic Tax Credits, Low-Interest Loans & Affordable Housing Grants

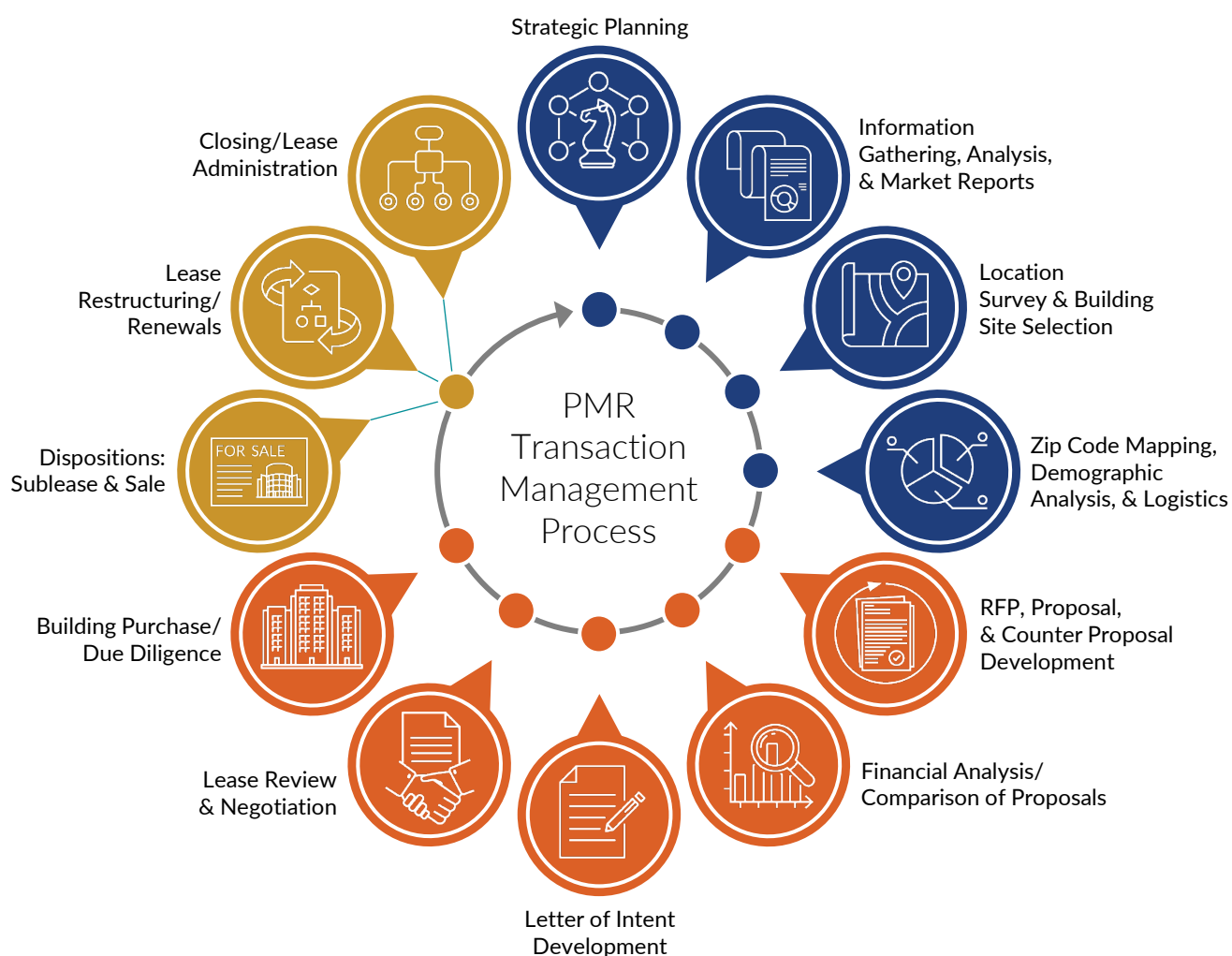
Deep Coordination With State & Local Governments

- ✓ Ann Arbor Housing Commission – Developer Procurement for 300+ Unit Mixed-Income Development
- ✓ City of Detroit Housing & Revitalization Department – Supporting Creation of New Policy Surrounding Enhanced Workforce Housing Tax Abatement Programs
- ✓ Michigan Economic Development Corporation – Participated in Action Committee Surrounding Changes & Amendments to Large-Scale TIF Programs

Transaction management

Our staff manage the process from strategic planning through final negotiations, providing real estate solutions that support your business goals.

We tackle each project from the point of view of the client. The right 2,000-square-foot location is just as important to one department manager as a 100,000-square-foot site is to another. We apply the same standards of quality to small transactions as we do to large transactions. Our approach and procedures for completing real estate activities and transactions are illustrated as follows:





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