

August 31, 2017

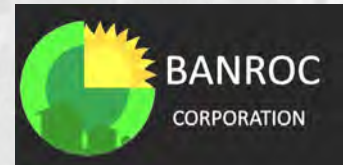
# Bayshore Gateway Triangle

## 17-Acre Land Development Proposal

PROPOSAL

**Bayshore Gateway Triangle  
Community Redevelopment  
Agency (BGT CRA)**

Solicitation 17-7169



**FORGE**  
DEVELOPMENT GROUP

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**BANROC FORGE DEVELOPMENT GROUP**

837 Fifth Ave South  
Naples, FL 34102

August 31, 2017

Dear County Commissioners:

When I first moved to the Windstar neighborhood in the Bayshore area of Naples four years ago, I immediately recognized the potential for Bayshore to become a special part of Naples. Ever since then, I have been involved with local residents, Bayshore lot owners, local builders, and the Bayshore CRA.

When the County announced it was going to set forth a public ITN / RFP for the 17-Acre Bayshore CRA property, I immediately went to work on creating a comprehensive development concept for the property. Fully aware of both the complexity and challenges the 17 Acres presented, our team developed a response to the specific ITN/RFP requirements. In addition, we also have developed a second proposal that unites the 17-Acre site with the adjoining Sugden Park to more fully optimize the potential of both these sites. We believe that our second proposal uniquely realizes the fullest potential of the Arts Village and Sugden Park while providing the greatest range of benefits to the widest spectrum of residents and businesses of Bayshore and Collier County. Included in this plan is the construction of accessibly priced housing.

By inter-connecting the 17-Acre Property with Sugden Park and Naples Botanical Gardens, we will be able to create a truly magnificent facility. Our proposed Bayshore Arts Village, the VPAC Performing Arts Center, and the Sugden Park improvements will provide exactly what the County's ITN is seeking. It will also create a destination for all citizens of Collier County that promotes arts and culture, as well as sports and general wellness for all ages. It will also forever transform Bayshore and be a major attraction for visitors to Naples.

I have carefully assembled an outstanding team under the Banroc Forge Development Group that is comprised of the very best professionals and companies who--working as a group--will ensure the success of the project.

My team and I very much look forward to the next steps in your process, and if there are any questions about our proposal please do not hesitate to reach out to me.

Sincerely,

A handwritten signature in black ink, appearing to read 'R. Bandinel', written in a cursive style.

Harry Bandinel  
President, BANROC Corporation

A close-up, slightly blurred photograph of a field of tall, green grasses. The blades are long and thin, and many are bent over, suggesting a breeze. The lighting is bright, creating a vibrant green color. The text 'A. Project Overview' is overlaid in the center-left area in a white, bold, sans-serif font.

# A. Project Overview

# A. Project Overview

## 1. Project Scope

### INTRODUCTION AND PROJECT TEAM

The Banroc Forge Development Group is a partnership working together with an extensive team of professionals and companies to participate in Collier County's "Invitation to Negotiate" (ITN) set forth by Collier County for the purchase and development of a 17-acre tract of land, belonging to the Bayshore CRA, located in the Bayshore area of Naples.

The Banroc Forge Development Group has put forth two proposals for the development of the 17-Acre CRA Tract. The first proposal, to be called Option A, directly addresses the County's ITN. The second proposal, Option B, includes Sugden Park and provides an alternative that Banroc Forge and its team believe is a much superior proposal. **Please see C. Team Experience beginning on page 40 for a full description of the entire team.**

### BANROC FORGE PROPOSED PROJECT

Banroc Forge's first proposal identified herein as Option A, directly addresses the County's ITN and limits the proposed scope of development to just the 17-Acre CRA Property. While still achievable, Banroc Forge studies have established some serious challenges with regard to having enough space to create a well-designed mixed use village and a 900-seat performing arts center on what are only nine (9) acres of usable land. These challenges include the economics of the proposal as well as building scale (size). But perhaps most significantly, there is a need in our view to create enough density in the housing component of the project and "Arts Village" to become the destination area our team believes the Bayshore area needs and deserves.

Therefore, Banroc Forge and our design team have studied and offers here a second proposal. The second proposal, Option B, includes the incorporation of Sugden Park into the overall project. Banroc Forge believes this to be a far superior option that will benefit everyone including Sugden Park, local residents and the Bayshore community, the City of Naples and Collier County.

Under Option B, Banroc Forge proposes to place the Performing Arts Center on the Northwest corner of Sugden Park and connect the 17-Acre Bayshore Arts Village with Sugden Park. This positioning of the Arts Center allows the significant facility to benefit from lake and its tremendous views, while also adding to the amenities and the attraction itself of Sugden Park. The

positioning of the Performing Arts Center allows expansive views to and from the center, while also allowing better back of house truck access for the Arts Center. Additionally, the scale of the Arts Center and its stagehouse is better managed relative to the intentionally lower scale Arts Village. This option allows for the design and construction of a far superior mixed use Bayshore Arts Village and provides the proper space required to build a genuine world class 900 seat Performing Arts Center that will be a marquee facility for all of Naples and Collier County.

Option B also includes significant upgrades and additional facilities in Sugden Park that will provide activities and events for citizens of all ages and all interests. Our intent is to make Sugden Park the "Central Park of Naples."

Banroc Forge's Option B will provide all citizens of Naples and Collier County access to an amazing facility that provides culture, arts, music, theater, sports, family events, farmers markets, art fairs, specialty shops, stores, restaurants and all kinds of entertainment. It will also provide beautifully designed and accessibly priced housing located throughout the Bayshore Arts Village.

In addition, Option B will integrate the Botanical Gardens to Sugden Park and the Bayshore Arts Village, this via walking and bike paths and a shuttle trolley.

The integration of the 17 acre Bayshore Arts Village with the vastly improved Sugden Park and connectivity to the Botanical Gardens will create a fantastic cultural and activity "HUB" for all residents of Collier County.

### PROJECT ARCHITECTURAL DESIGN AND STYLE

Regarding the architectural design and style of the Bayshore Village, the Performing Arts Center and Sugden Park improvements Banroc Forge's intent is to set up a Focus Group comprised of local residents, members of the Bayshore CRA, directors of Collier PSD Parks and Recreation, directors of VPAC, City of Naples and Collier County government officials and our architects and engineers to provide input on the Project's style and design.

Banroc Forge feels that input from all these sources will enable us to create a design and style that is fitting to our concept of a beautiful arts and culture destination and also allow us to create a project that is appealing to local residents and in harmony with the Bayshore area.

Following is a series of photos taken from Google images with the intent of illustrating the overall lifestyle and amenities that will be included in the proposed project.



Images for reference only

PM

## **BANROC FORGE AGREEMENT WITH OPERA NAPLES, CAPA, AND VPAC**

An integral part of Banroc Forge's proposal under this ITN includes the design and construction of a world class 900-seat, 75,600 square foot Performing Arts Center for Opera Naples and CAPA under the direction of VPAC (Visual and Performing Arts Collaboration - Naples). This world class performing arts center will be one of the central cultural components of the Banroc Forge's development plan.

Opera Naples and CAPA have created VPAC with the specific purpose of funding, building, and managing the 900-seat Performing Arts Center.

Banroc and VPAC have signed an MOU wherein Banroc Forge Development Group will design and build the Performing Arts Center under the provision that Banroc Forge secures a suitable parcel of land upon which to build the Performing Arts Center for VPAC.

VPAC has worked closely with Banroc Forge and the DLR Group (Design Architect and Performing Arts Specialist) over the past three (3) months in the design and development of the proposed Performing Arts Center to specifically create a "flexible and multi-use facility" so as to optimize the functionality of the facility over time. This concept is central to the planning for both Option A and Option B and as an example is evident in how the Studio Theater is planned so that it shares both front and back of house support spaces with the Opera Hall. Additionally, the Studio Theater is designed to be being expandable into and open to booth the lobby spaces and the adjacent lawn. In Option B, the Studio Theater also opens onto the amphitheater lawn so that patrons in that significant outdoor space can participate in activities at the amphitheater stage or the Studio Theater.

It is important to note that Banroc Forge and its entire team of design professionals involved in the construction of both proposed Options A and B strongly encourage the consideration of Option B as we believe this proposal best optimizes both the 17-acre site related to the ITN and Sugden Park, and the tremendous potential synergies between the two. This opinion is also shared by VPAC.

**See D. Additional Information beginning on page 120 for more information regarding VPAC's plans as well as relevant IRS 990s.**

## **PROPOSED 99 YEAR LEASE FOR VPAC PERFORMING ARTS CENTER IN SUGDEN PARK**

Banroc Forge has had multiple meetings with Collier County Parks Public Services Division and has also made a formal presentation to the Collier County Parks Advisory Board to demonstrate our proposed Option B in Sugden Park. Both parties demonstrated full support and enthusiasm for the plan.

Banroc Forge as part of its proposed Option B is proposing that Collier County grant VPAC a 99-year lease for the 4 acres of land VPAC will require in Sugden Park upon which to build the Performing Arts Center. The lease would be for a token sum of 100 dollars per year. VPAC in collaboration with the Banroc Forge Group will design, build and fund the entire Performing Arts Center. VPAC will manage the Center. See attached VPAC information.

In meetings with Collier County Parks Public Services Division it was established that Collier County Parks had in the past established similar agreements to lease Park land to public / private and not for profit entities.

## **ADDITIONAL NEW IMPROVEMENTS IN SUGDEN PARK**

Under Banroc Forge's Option B would be the inclusion a significant number of additional facilities and improvements inside Sugden Park that have been specifically designed to enhance the Park and create a facility that provides access to art, culture and sports. These additional facilities are outlined in detail under Option B below.

## **THE SHADLEY PROPERTY - 2.5 ACRE ADJOINING LOT**

Banroc Forge has a purchase agreement with the Shadley family to purchase the 2.5 acres owned by the Shadley family that borders the 17 Acre CRA property on the west side. This significantly enhances the design and overall functionality of the Bayshore Arts Village as a mixed use project.

## **THE TWO OPTIONS – OPTION A AND OPTION B**

As stated above, Banroc Forge has created two options in response to Collier County's ITN. Option A was created to respond directly to the ITN. Option B is what Banroc Forge believe will be a far superior choice and a much better option for everyone - the residents of Bayshore, for VPAC, for Sugden Park, for Botanical Gardens, for Naples and for Collier County.

Following each option is described in more detail:

## **OPTION A – 17-ACRE CRA AND SHADLEY PROPERTY ONLY THE BAYSHORE ARTS VILLAGE**

As per the preliminary site plan attached hereto Option A (17-Acre CRA Tract and the Shadley property) will include the following:

### **1. The Bayshore Arts Village**

A quaint walkable village with a lake-front town square with open air piazzas and walkways providing pedestrians access to retail, restaurant, office and residential spaces. The Village's main level will be built on a "podium" above a ground level garage having parking for 250 cars. The garage will be designed so that the public views are of an amenity or natural elements as opposed to seeing the cars. The main level will include a mix of small specialty shops, storefront offices, boutiques, health food store, ice cream parlor, coffee shops, a gourmet deli, a bakery, a gourmet food store, small art and crafts galleries, a wine store and 6 indoor /outdoor restaurants.

Also a part of the Village will be small residential lofts and condos build on the second and third floors above main level All residential condos and lofts will have small balconies and outdoor spaces overlooking the Village and lakes.

The Village will also have small office suites located above the main level.

The Village's tiered central square surrounded by outdoor restaurants will be a hub of activity and the heart of the community. Regular events, festivals, entertainers, music and performers will provide entertainment, bring life to the Village and draw visitors from all over. Emphasis will be on outdoor dining, cultural events, music and entertainment. This central square area will be axially aligned with and directly opposite the Residential Village which will be accessible via a generous connecting bridge.

The objective with the Bayshore Arts Village is to create the feel and atmosphere of a small village that is a desirable destination unto itself. All levels will be staggered and have different elevations and setbacks to give the Village an architecturally attractive look and provide the feel of a small village with a wide variety of spaces and activity zones.

A large part of its attraction will be to just experience the special atmosphere created by the unique design and amenities of the Village and its waterside setting.

In keeping with the overall goal of the Bayshore Arts Village to provide accessibly priced retail, office and living spaces all units will be designed to maximize space and minimize size. Therefore, shops and commercial spaces will be 600 to 1,500 square feet, office spaces will be 500 to 1,000 square feet.

A total of 120 residential lofts and condos will range in size from 750 to 1,250 square feet and be priced for sale between \$195,000 and \$325,000. To provide workforce housing and accessibly priced rentals, approximately 50% of the condos will be set aside as rental units with monthly rental rates between \$900 and \$1,600 per month.

### **2. The VPAC Performing Arts Center**

Located in the center of the Bayshore Arts Village the VPAC Performing Arts Center will be a state of the art center world class performing arts center and designed to be a multi-use and flexible facility to accommodate all kinds of performances. The ability of the Arts Center to be designed and located to offer flexible space uses is key to the design and long term viability of the facility.

### **3. Residential Rental Aparthotel and Parking Garage**

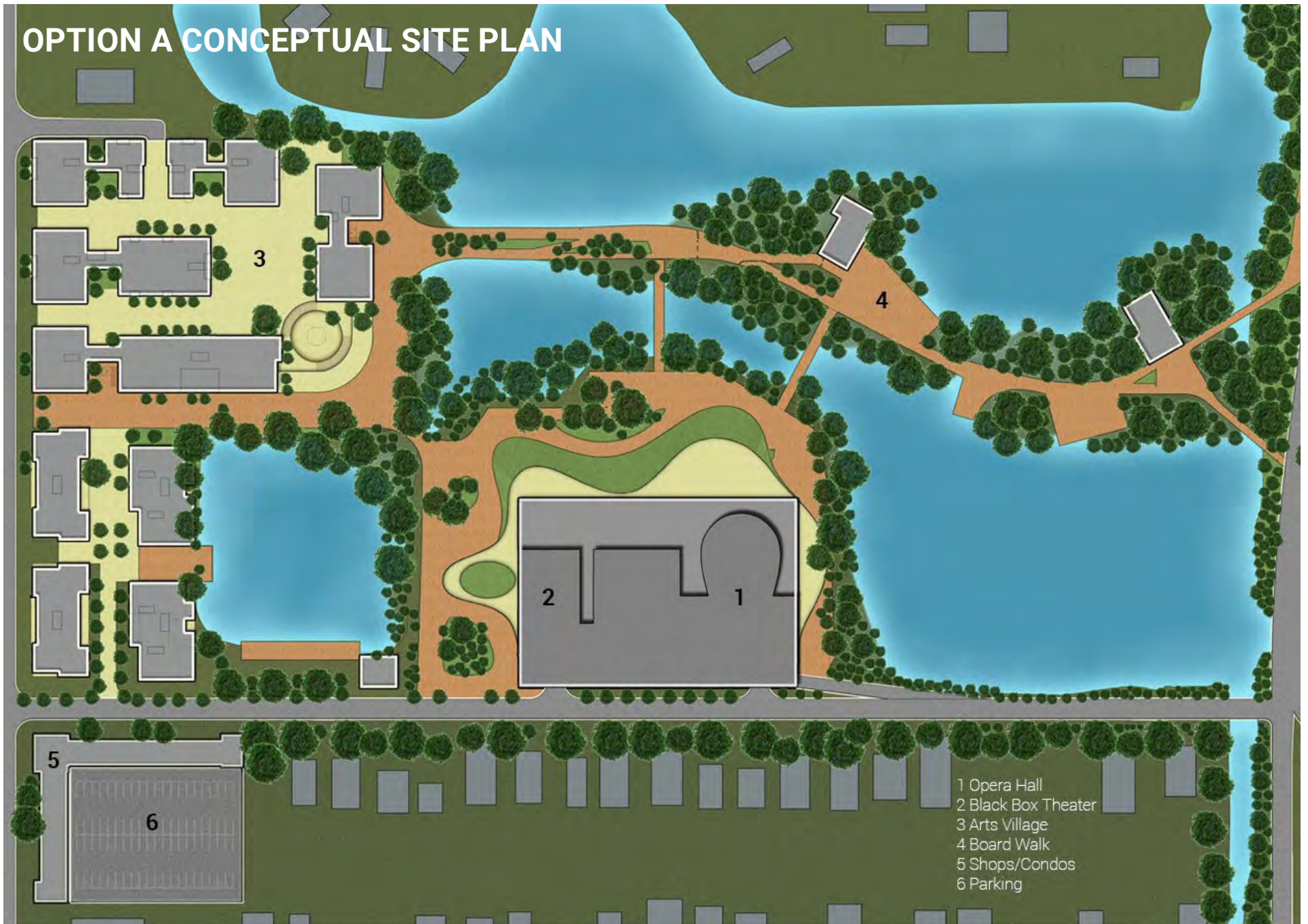
This will be located on the southwest parcel of the 17 acres that fronts Bayshore Drive and will include a 50 unit residential short term rental "aparthotel." The Aparthotel will consist of small 2-bedroom, 2-bath elegantly furnished condos (approximately 750 SF each) that will be rented weekly or monthly. Focus will be toward tourists and visitors as an option to staying in a hotel. The Aparthotel building will also house the onsite rental and management office for the Bayshore Arts Village and a parking garage for 100 cars.

### **4. Option A - Parking Garages**

The 17-Acre Bayshore Arts Village will have public parking in three locations around the Village. The main parking garage will be under the Bayshore Arts Village and will provide parking for 250 cars. The Aparthotel will have a parking garage for 100 cars. In addition the Performing Arts Center will have under building parking for 150 cars. There will also be outdoor surface parking spread around the perimeter of Village totaling 50 cars. Total parking will be for 550 cars.



# OPTION A CONCEPTUAL SITE PLAN



- 1 Opera Hall
- 2 Black Box Theater
- 3 Arts Village
- 4 Board Walk
- 5 Shops/Condos
- 6 Parking

## **OPTION B – 17 ACRE CRA PROPERTY AND SUGDEN PARK**

As stated above, Banroc Forge has created two options for the proposed development of the 17-Acre CRA Tract. Banroc Forge's Option B was created as a far superior design for the overall project and provides many additional benefits to the community.

By incorporating Sugden Park into the project and building the Performing Arts Center in Sugden Park, Option B also specifically address and solves the shortfalls of Option A.

A key component of the overall Bayshore Arts Village and Sugden Park Project will be to upgrade Sugden Park and provide many additional venues inside the park that will create a synergy with the proposed Bayshore Arts Village.

Another important objective of Option B will be will to provide connectivity between Sugden Park, the Bayshore Arts Village and the Naples Botanical Gardens. This will be accomplished by creating walking and bike paths as well as a shuttle trolley service providing visitors continuous transportation between all three facilities.

### **1. The Bayshore Arts Village**

A quaint village with a lakefront town square with open air piazzas and walkways providing pedestrians access to retail, restaurant, office and residential spaces. The Village's main level will be built above a ground level garage having parking for 250 cars. The main level will include a mix of small specialty shops, storefront offices, boutiques, health food store, ice cream parlor, coffee shops, a gourmet deli, a bakery, a gourmet food store, small art and crafts galleries, a wine store and 6 indoor /outdoor restaurants.

Also a part of the Village will be small residential lofts and condos build on the second and third floors above main level All residential condos and lofts will have small balconies and outdoor spaces overlooking the Village and lakes.

The Village will also have small office suites located above the main level.

The Village's central square surrounded by outdoor restaurants will be a hub of activity and the heart of the community. Regular events, festivals, entertainers, music and performers will provide entertainment, bring life to the Village and draw visitors from all over. Emphasis will be on outdoor dining, cultural events, music and entertainment.

The objective with the Bayshore Arts Village is to create the feel and atmosphere of a small village that is a destination unto itself. All levels will be staggered and have different elevation and setbacks to give the Village an architecturally attractive look and provide the feel of a small village.

A large part of its attraction will be to just experience the special atmosphere created by the unique design and amenities of the Village and its lake side setting.

In keeping with the overall goal of the Bayshore Arts Village to provide accessibly priced retail, office and living spaces all units will be designed to maximize space and minimize size. Therefore shops and commercial spaces will be 600 to 1,500 square feet, office spaces will be 500 to 1,000 square feet.

A total of 120 residential lofts and condos will range in size from 750 to 1,250 square feet and be priced for sale between \$195,000 and \$325,000. To provide workforce housing and accessibly priced rentals, approximately 50% of the condos will be set aside as rental units with monthly rental rates between \$900 and \$1,600 per month.

### **2. The Bayshore Residential Village**

Integrated into the Bayshore Arts Village and located on the south side across from the Commercial Village will be a cluster of five uniquely designed multistory lake front residential condominium buildings with a total of 80 condos, each approximately 1,400 square feet in size and priced between \$275,000 \$325,000.

### **3. Residential Rental Aparthotel and Parking Garage**

This will be located on the southwest parcel of the 17 acres that fronts Bayshore Drive and will include a 50 unit residential short term rental "aparthotel." The aparthotel will consist of small 2 bedroom 2 bath elegantly furnished condos (approximately 750 sq. ft. each) that will be rented weekly or monthly. Focus would to tourists and visitors as an option to staying in a hotel.

The Aparthotel building will also house the onsite rental and management office for the Bayshore Arts Village and a parking garage for 100 cars.

# OPTION B CONCEPTUAL SITE PLAN



#### **4. The VPAC Performing Arts Center**

Banroc Corporation has an agreement with the Naples Visual and Performing Arts Collaboration (VPAC - which includes Opera Naples and CAPA) to design and build a 60 million dollar, 900 seat world class "Performing Arts Center" and "Black Box" on the west side of Sugden Park directly adjacent to the proposed 17 Acre Bayshore Arts Village.

Given the beauty of its architecture and lakefront setting this will allow the Performing Arts Center to also host all kinds of exhibits and events to maximize the use of the facility. The Performing Arts Center will be a highly flexible facility and be the anchor for the whole project.

#### **5. Black Box and Concert Field**

The Black Box will provide both an indoor and outdoor facility for any kind of performing arts and music events. The Black Box will be designed as a flexible venue and designed so the building open on three sides and becomes an outdoor stage for the adjacent 6,000 person Concert Lawn. This will allow for all kinds of outdoor concerts and performances in Sugden Park.

#### **6. Concert Lawn**

The Concert Lawn will allow for large outdoor concerts for up to 6,000 people. Concerts would include all types of music for all ages and tastes - Classical, Latin, Pop, Rock, Rap, County Western, Hispanic and other Ethnic music along with any type of performing arts events.

#### **7. The Lakefront Stage and Culture Cover**

The Lakefront Stage and Culture Cove will be located between the Concert Field and Avalon Lake to provide a venue for waterfront performances that can be seen from all over Sugden Park. This would be ideal for such events as Fireworks Shows and outdoor performances.

#### **8. The Events Field and Saturday Farmers Market**

Located on the west side of Sugden Park will be the Events Field. This will be an open field surrounded by water on both sides, designed specifically as a

waterfront fairground to host events such as art fairs, children's fairs, antique shows, car shows and any kind of festival.

It will also be designed as a beautiful lakefront facility to host a weekly "Saturday Morning Farmers Market". This will be a truly unique weekly event that will draw people from all over Collier County and be a great benefit for local farmers and small businesses.

It will have electric power for event tents and stalls along with restroom facilities and be tied to the adjacent International Food Court and Plaz des Artists.

#### **9. The International Food Court and Lakefront Deck**

Located on the south end of the Events Field will be a large waterfront deck housing the International Foods Court. This will be comprised of six different food providers with each offering a different type of ethnic food. Patrons would dine on the large covered deck overlooking Lake Avalon.

#### **10. The Plaz des Artists**

Located on the west side of the Events Field will be the Plaz des Artists, this being a semi covered outdoor plaza dedicated to art exhibits and shows. The facility will be created as a center for those who love art and theater to convene. On one side of the Plaza will be the Artist Lofts and a small Art Exhibition Hall.

On the other side of the Plaz des Artists will be an Alternative Cinema housing five small movie theaters dedicated to showing international and alternative movies. There will also be a small coffee shop and snack bar in the Plaza.

#### **11. The Artist Lofts**

The Artist Lofts will be comprised of a building housing 15 small artist studios that will be used by local artists and craftsmen and awarded on a merit basis so as to provide the each Artist a place from which to work and interact with the public. Included in the building will be a small Exhibition Hall for artists to exhibit and sell their craft.



Images for reference only

### **12. The Alternative Cinema**

Located across the Plaz des Artists the Alternative Cinema is comprised of five small cinemas each with 100 seats dedicated to showing Alt Movies and International Films. The cinemas will have a small stage so they can also be used as lecture halls and venues for small musical or theatrical performances. The Cinema theaters can also be used as class rooms and lecture halls for all kinds of art and culture programs - for both children and adults.

### **13. Botanical Gardens Exhibit Hall**

Located on the south side of Sugden Park this is an Exhibit Hall tied to Naples Botanical Gardens. Part of the intent of the exhibition hall is to attract the visitors from Botanical Gardens to visit the Park and Village and to help unite the three facilities.

### **14. Walking and Bike Path - Arts Village, Sugden Park, and Botanical Gardens**

A walking and bike path will connect the Bayshore Arts Village with Sugden Park and the Botanical Gardens. The path will also have exercise stations along its trajectory.

### **15. Shuttle Trolley**

A shuttle trolley will provide public transportation between the Arts village, Sugden Park, and Botanical Gardens.

### **16. Sugden Park Soccer Fields**

On the south side of Sugden Park will be two regulation size soccer fields with bleachers and a small management office that will oversee all sports programs in Sugden Park.

The new soccer facility is also is meant to replace the soccer fields in East Naples Park as there is a need to increase the Pickle Ball courts facility which could be accomplished by taking over the existing soccer fields in East Naples Park. The soccer facility will be a great addition to Sugden Park.

### **17. Palm Grove Park and Pond**

Located between the beach and soccer fields will be a small pond and shaded grove designed as a place to sit and relax. It will have a few Bocce Ball courts and benches along with a pond.

### **18. Kids Playground**

Between the Palm Grove Park and Boat Rental will be a secure fenced in children's playground with all kinds of slides, swings and kids play stations along with benches for adult to supervise their kids.

### **19. Park Piers and Boat Rental Facility**

Located south of the park beach will be an expansion and upgrade of the existing boat rental facility that will provide paddle boats, canoes and small sail boats for rent.

### **20. Sugden Park Beach**

This will remain as the existing Park Beach. Added would be lounge chair rentals and small gazebos to provide a place to sit in the shade. In addition we would build two beach volleyball courts.

### **21. Food Trucks Area**

Located on the east side of the Park next to the Park Green will be an area reserved for food trucks and vendors who would rent the space and sell food during special events, on weekends and holidays.

### **22. The Park Green**

In the north east corner of the Park will be the "Park Green," this being a large open lawn surrounded by trees and benches with a view of the lake. The "Park Green" will be for families to play ball, throw Frisbees, picnic, fly a kite and hang out together. On the west end of the Park Green will be a covered open air stage designed to host amateur musicians, performers and entertainers.

### **23. Barbecue and Picnic Huts**

Located on the waterfront all along the north shore of Avalon Lake will be small barbecues each with a picnic hut.

### **24. Dog Park**

The Dog Park will be a fenced in area in front of Avalon Lake next to the Aquatic Ski Center where people can bring their dogs and let them run loose. It could also host dog and other animal shows. It will have waterfront park benches and be a great place to sit and relax.

### **25. The Ski Center**

The existing ski center and bleachers will remain as they are.

### **26. Parking in the Park**

Banroc Forge and its team have spent a significant amount of time to assure there will be ample and well distributed parking in the Arts Village and Sugden Park.

Sugden Park will have multiple parking facilities for a total of 2,900 cars.

**Please see the parking diagrams in Section B. Exhibits and Projects Imagery for additional information and summary tabulations.**

## **CREATING A GREEN AND LEED-CERTIFIED PROJECT**

In keeping with Banroc's philosophy to conserve and protect natural resources and the environment, Banroc Forge and its team plan to make the project "Green" and Sustainable" and will attempt to "LEED" certify the entire project. This will add value to the community, make it unique in Naples and also protect Sugden Park.

## 2. Community Impact

### ABOUT THE DEVELOPER'S VISION AND BENEFIT TO THE BAYSHORE COMMUNITY

Banroc Corporation, via its president Harry Bandinel, has been involved with 17-Acre Tract and several other properties in the Bayshore area for the past two years. Harry has also attended many Bayshore CRA meetings, is a former resident of Windstar and for the past two years a resident of East Naples. In short he is intimately familiar with Bayshore and the community.

Harry has been involved in South Florida real estate for 28 years. He started in 1989 as a project manager for the 250-home golf course PUD called Waterford in Venice, Florida. He has been involved in a diverse range of projects including an assisted living facility The Villages in Ocala, commercial land rezoning in Clearwater, low income townhomes in Dunedin and St Petersburg. He has also designed and built multimillion dollar homes on Longboat Key, Siesta Key and Marco Island. He has also been a licensed contractor and active Realtor.

Harry is currently involved in luxury condo project under construction (2 million dollar condos) in downtown Naples (875 Sixth Avenue South), is building single family workforce homes in Lehigh Acres (1,500 square homes for \$165,000) and is finalizing an agreement to be one of seven approved builders in Babcock Ranch alongside builders like Lennar, Pulte, Stock, and Homes by Towne.

As the creator and lead developer of this proposal, Harry has spent an extensive amount of time meeting with local residents and business owners, arts and culture organizations, staff of Collier County Parks and County Government officials with the express purpose of getting an in-depth understanding of the needs, ideas, and opinions of all involved in the Bayshore community.

As part of the overall goal of creating a "Special and Unique Place" that will forever change Bayshore, Harry also sought to achieve multiple additional and important objectives for the benefit of the Bayshore community and residents of Collier County.

These specific objectives are:

1. Create a unique and beautiful Arts and Culture Village that will transform the Bayshore area
2. To design and build a world-class Performing Arts Center for the benefit of all of Naples
3. Provide a wonderful community Park with multiple sports and entertainment venues
4. Unite Botanical Gardens to the Arts Village and Sugden Park for the benefit of all
5. Provide workforce housing for rent and for purchase that is beautiful, affordable, and unique

### PROJECT BENEFITS - FOR BAYSHORE AND COLLIER COUNTY

The new Bayshore Arts Village along with the redesign and upgrading of Sugden Park will create a "Central Park of Naples" that will be a magnet for all - the young, the old, the rich, the poor, and those who desire entertainment, sports and wellness activities. By coupling new housing and the park with a strong arts and culture program, our proposal is meant to appeal to the desire to develop and strengthen both mind and body. It will also be a destination for those who just want to relax, eat, drink and be merry with family and friends in unique and special natural setting. By reinforcing the connectedness to nature, we are allowing the natural surroundings to act as an "equalizer" that makes the development attractive and comfortable across the fuller spectrum of the citizens in our community. Our goal is to not just create a place where one goes to do something, but rather a destination that one knows something is always going on at and thus wants to go to on a regular basis.

The construction of the world class lake-front VPAC - Performing Arts Center will be a marquee building and facility for all of Naples. It will also allow Naples to draw artistic talent of the highest caliber from all over the world. This will give Naples worldwide exposure that will provide many benefits to all in Naples and Collier County.

The uniting and interaction of the Bayshore Arts Village with Sugden Park and the Botanical Gardens will create a synergy that will benefit all of Bayshore and further assure the success of each facility. The "connectivity" between the three



facilities will be accomplished via a network of walking and bike paths, a continuous trolley service between all three facilities and the construction of a Botanical Gardens Exhibition Hall in Sugden Park.

The almost 200 residential condos and lofts designed and incorporated into the Bayshore Arts Village under Option B will provide unique and wonderful homes for Naples' workforce. By reducing the size of each condo and loft, Banroc Forge will provide homes for purchase that will be priced from \$195,000 to \$325,000. For those seeking to rent we will have units priced from \$900 to \$1,600 per month.

This project is without doubt ambitious and challenging. However, the Banroc Forge Group has carefully assembled an outstanding team of professionals and companies who have long track records designing and building large and complex projects. Banroc Forge has specifically selected each team member for the particular expertise each member provides. As a group of experts we have no doubt that given the opportunity we will make this project an outstanding success.

Our team is very aware of the significant needs and expectations within our community for adequate parking. The Banroc Forge team has considered and provided solutions for parking for both Options A and B. Additionally in Option B the highest parking need is created when the amphitheater is in use and we have included plans for a scenario when up to 2,900 cars need to be parked in Sugden Park. This will allow the Park to host large outdoor concerts and special events simultaneously.

For almost two decades Collier County has been trying to revive the Bayshore area. This project will be truly transformational for Bayshore and a huge benefit for all of Naples and Collier County.

## 3. Zoning

### PROPOSED ZONING AND PUD - 17 ACRES AND SHADLEY PROPERTY

It is the intent of Banroc Forge to rezone both the 17 Acres and the Shadley property and create one mixed use PUD. Under Option A, Banroc Forge expects to have a total 241 units and the Performing Arts Center.

Under Option B, that includes Sugden Park, Banroc Forge plans allow for a total of 320 units on the 17 Acre CRA Property and the Shadley lot. One of the many benefits of placing the Performing Arts Center in Sugden Park is that we are able to obtain an additional 80 workforce / accessibly priced condos on the 17 Acre CRA Tract.

**See attached site plan(s) on pages 30 and 31 and unit breakdowns on pages 18-25.**

## 4. Financing

Banroc Forge plans to purchase the 17 acres from the Bayshore CRA under an outright fee simple purchase contract. The funding for this purchase will be provided by one of Banroc's partners. Evidence of funds available can be provided upon request.

The funding for the development and construction of the Bayshore Arts Village will be provided via a combination of private equity and bank financing provided by sources from Avison and Young and also by Forge Development. The funding for the 80 unit Residential Condos will come from a private condo developer.

The funding for the VPAC Performing Arts Center will be provided by private donors that have been obtained by VPAC, Opera Naples and CAPA. Opera Naples and CAPA have been working with donors for many years. Their principal donors (those who will provide the major portion of the funding) have agreed to provide the donations for the Performing Arts Center under the provision that VPAC / Opera Naples and CAPA find a site / property that meets the approval of the donors. The 17 Acre site if developed under Banroc Forge design has the stamp of approval from VPAC donors.

Banroc Forge is requesting that County Parks grant ninety nine year leases at token pricing for any facilities to be built in Sugden Park under Banroc Forge's plan. This applies directly to the Performing Arts Center, the Plaz de Artist, and the International Food Court.

With regard to the funding of the parking garages Banroc Forge will be proposing that the City of Naples and Collier County assist with some of the cost.

Banroc Forge will be providing workforce housing inside the proposed project (affordable housing) and will be seeking additional density bonuses and impact fee relief from the City and County for this.

**Please see a summary pro forma for Options A and B following this page.**

## 5. Total Project Value

### ESTIMATED NEW CONSTRUCTION TAXABLE AND NON-TAXABLE VALUE

#### Option A – Bayshore Arts Village and Performing Arts Center on 17 Acres

|   |              |
|---|--------------|
| Taxable - New Residential and Commercial Construction | \$65,500,000 |
| Non Taxable – Performing Arts Center                  | \$45,000,000 |

#### Option B – Bayshore Arts Village, Performing Arts Center, and Sugden Park Improvements

|   |              |
|---|--------------|
| Taxable - New Residential and Commercial Construction | \$89,100,000 |
| Non Taxable – PAC and Sugden Park Improvements        | \$60,350,000 |

# BAYSHORE ARTS VILLAGE AND VPAC - OPTION A

## LIST OF TOTAL UNITS / VENUES BREAKDOWN / SUMMARY PROFORMA

### UNIT BREAKDOWN

August 28 2017

#### 17 Acre CRA Bayshore Arts Village

# UNITS

|   |            |
|---|------------|
| Residential Condos and Lofts In Commercial Village                        | 120        |
| Village Loft Offices  | 25         |
| Village Ground Storefront Floor Offices                                   | 10         |
| Village Shops Ground Floor Storefront                                     | 25         |
| Aparthotel Suites   | 50         |
| Food Service - Coffee Shop, Ice Cream, Deli, Confectionary                | 4          |
| Restaurants   | <u>6</u>   |
| <b>Total 17 Acre &amp; Shadley Commercial / Residential Village Units</b> | <b>240</b> |

#### Village Parking

|   |            |
|---|------------|
| Under Village Parking                     | 250        |
| Under VPAC Performing Arts Center Parking | 200        |
| Surface Parking                           | 40         |
| Aparthotel Parking Garage                 | <u>100</u> |
| <b>Total Village Parking Spaces</b>       | <b>590</b> |

### BREAKDOWN OF APPROXIMATE SQUARE FEET OF CONSTRUCTION

#### Commercial Village Ground Floor

|  | Unit Size  | Total Sq. Ft. |
|--|------------|---------------|
| Food Shops 4 - Each 1,500 Sq. Ft.                    | 4 x 1,500  | 3,000         |
| Restaurants 3 - Each 2,000 Sq. Ft.                   | 3 x 2,000  | 6,000         |
| Restaurants 3 - Each 5,000 Sq. Ft.                   | 3 x 5,000  | 15,000        |
| Storefront Offices 10 Each 1,500 Sq. Ft.             | 10 x 1,500 | 15,000        |
| Storefront - 25 Small Retail Shops Each 1,000 Sq. Ft | 25 x 1,000 | 25,000        |
| <b>Total Ground Floor Foot Print - 64,500 Sq. Ft</b> |            | <b>64,000</b> |

|  |           |                      |
|--|-----------|----------------------|
| <b><u>Commercial Village Second Floor</u></b>        | Unit Size | <b>Total Sq. Ft.</b> |
| Office Suites 25 - Each 600 Sq. Ft.                  | 25 x 600  | 15,000               |
| Loft Condos Residential 40 - Each 800 Sq. Ft.        | 60 x 800  | <u>48,000</u>        |
| <b>Total Second Floor Foot Print - 63,000 Sq. Ft</b> |           | <b>63,000</b>        |

|  |           |                      |
|--|-----------|----------------------|
| <b><u>Commercial Village Third Floor</u></b> | Unit Size | <b>Total Sq. Ft.</b> |
| Loft and Condos 40 Each 1,000 Sq. Ft.        | 40 x 1000 | <u>40,000</u>        |
| <b>Total Third Floor 40,000 Sq. Ft.</b>      |           | <b>40,000</b>        |

|   |            |                      |
|---|------------|----------------------|
| <b><u>Commercial Village Fourth Floor</u></b> | Unit Size  | <b>Total Sq. Ft.</b> |
| Penthouse Loft Condos 20 Each 1,200 Sq. Ft.   | 20 x 1,200 | <u>24,000</u>        |
| <b>Total Fourth Floor 30,000 Sq. Ft.</b>      |            | <b>24,000</b>        |

|   |          |           |
|---|----------|-----------|
| <b><u>Aparthotel and Parking Garage</u></b>               |          |           |
| Total Construction Aparthotel Sq. Ft. 50 X 900 x 3 Floors | 50 x 900 | 45,000    |
| Parking Garage 100 Cars                                   |          | 30,000    |
| Total Number Aparthotel Units 50                          |          | <b>50</b> |

### **17 ACRE CRA VILLAGE VERTICAL CONSTRUCTION COSTS AND SALE PRICES**

| <b>VENUE AND APPROXIMATE SALE PRICE</b>  | <b>Unit Rent<br/>Monthly</b> | <b>Unit Sale<br/>Price</b> | <b>Total Sale<br/>Price</b> | <b>Total Sq. Ft.<br/>Cost Sq. Ft.</b> | <b>Total<br/>Cost</b> |
|--|------------------------------|----------------------------|-----------------------------|---------------------------------------|-----------------------|
| <b><u>Food Shops 4 x 1,500 = 6,000 Sq. Ft.</u></b> @ rent \$20 Sq. Ft. 8 CAP     | 2,500                        | 375,000                    | 1,500,000                   | 6,000 x 80 GS                         | 480,000               |
| <b><u>Restaurants 3 x 2,000 = 6,000 Sq. Ft.</u></b> @ rent \$ 20 Sq.. 8 CAP      | 3,300                        | 500,000                    | 1,500,000                   | 6,000 x 80 GS                         | 480,000               |
| <b><u>Restaurants 3 x 5,000 = 15,000 Sq.</u></b> @ rent \$20 Sq.. 8 CAP          | 8,333                        | 1,250,000                  | 3,750,000                   | 15,000 x 80 GS                        | 1,200,000             |
| <b><u>Shops 25 x 1,000 Sq. Ft = 25,000</u></b> @ rent \$18 Sq.. 8 CAP            | 1,500                        | 225,000                    | 5,625,000                   | 25,000 x 80 GS                        | 2,000,000             |
| <b><u>Office Storefront 10 x 1,500 = 15,000</u></b> @ rent \$20 Sq.. / 8 CAP     | 2,500                        | 375,000                    | 3,750,000                   | 15,000 x 80 GS                        | 1,200,000             |
| <b><u>Second Floor Office 25 x 600 = 15,000</u></b> @rent \$15 Ft / 8 CAP        | 750                          | 112,500                    | 2,812,500                   | 15,000 x 80 GS                        | 1,200,000             |
| <b><u>Second Floor Condos 30</u></b> x 800 SQ. Ft Unit Price 180,000 / 6 CAP     | 900                          | 180,000                    | 5,400,000                   | 24,000 x 110                          | 2,640,000             |
| <b><u>Second Floor Condos 30</u></b> x 800 SQ. Ft Unit Price 240,000 / 6 CAP     | 1,200                        | 240,000                    | 7,200,000                   | 24,000 x 125                          | 3,000,000             |
| <b><u>Third Floor Condos 40</u></b> x 1,000 Sq. Ft. Unit Price 280,000 / 6 CAP   | 1,400                        | 280,000                    | 11,200,000                  | 40,000 x 130                          | 5,200,000             |
| <b><u>Fourth Floor Condos 20</u></b> x 1,200 Sq. Ft Unit Price \$320,000 / 6 CAP | 1,600                        | 320,000                    | 6,200,000                   | 24,000 x 135                          | 3,240,000             |
| <b><u>Aparthotel 50</u></b> @ rent \$200 night x 50% Net 1,800,000 RENT          | 36,000                       | 360,000                    | 18,000,000                  | 40,000 x 150                          | 6,000,000             |
| <b>TOTALS</b>  |                              | <b>Total Revenue</b>       | <b>65,437,500</b>           | <b>Build Cost</b>                     | <b>26,640,000</b>     |

### **17 ACRE CRA VILLAGE TOTAL ESTIMATED COST**

|  | <b>Cost</b>       |                                |
|--|-------------------|--------------------------------|
| Land Purchase 17 Acres CRA                                 | 3,200,000         |                                |
| Shadley Property   | 900,000           |                                |
| Re Zone  | 100,000           |                                |
| Site Clearing  | 100,000           |                                |
| Site Development 10 Acres x 150,000 Acre                   | 1,000,000         |                                |
| Architectural Design                                       | 500,000           |                                |
| Engineering  | 500,000           |                                |
| Impact Fees 240 Units x 10,000 (Reduced)                   | 2,400,000         | (County to Reduce Impact Fees) |
| Permits 240 Units x 2,000 (Reduced)                        | 480,000           | (County to Reduce Permit Fees) |
| Total Build Cost   | 26,640,000        |                                |
| Public Areas / Plazas                                      | 1,500,000         |                                |
| Under Village Parking 250 Spaces                           | 1,500,000         |                                |
| Aparthotel Parking Garage 100 Spaces                       | 1,200,000         |                                |
| Allowance for Construction Funding 15,000,000 x 8% x 2 yr. | 2,400,000         |                                |
| Contingency Fund / Misc Costs                              | 1,500,000         |                                |
| Sales Commissions and Marketing Costs (\$50,000,000 x 5%)  | 2,500,000         |                                |
| Closing Costs \$50,000,000 x 1.5%                          | <u>750,000</u>    |                                |
| <b>Total Cost</b>  | <b>47,170,000</b> |                                |

### **17 ACRE CRA VILLAGE PROJECTED PROFIT**

|  |                   |  |
|--|-------------------|--|
| Total Revenue / Value of New Construction              | 65,437,500        | <b><u>(Plus \$45,000,000 Performing Arts Center)</u></b> |
| Less Total Cost of Project - Land / Build / Soft Costs | <u>47,170,000</u> |  |
| <b>17 ACRE CRA Estimated Profit</b>                    | <b>18,267,500</b> |  |

|  |            |
|--|------------|
| Project Development Time                         | 36 Months  |
| <b>Estimated ROI \$18,267,500 / \$47,170,000</b> | <b>39%</b> |

**Disclaimer: This SUMMARY PROFORMA and all its projections are only preliminary estimates. Actual costs are subject to final construction plans and may vary significantly.**

# BAYSHORE ARTS VILLAGE AND SUGDEN PARK - OPTION B

## LIST OF TOTAL UNITS / VENUES BREAKDOWN / SUMMARY PROFORMA

### UNIT BREAKDOWN

August 28 2017

#### 17 Acre CRA Commercial and Residential Village

# UNITS

|   |            |
|---|------------|
| Residential Condos and Lofts In Commercial Village                        | 120        |
| Condos in Residential Village   | 80         |
| Village Loft Offices  | 25         |
| Village Ground Storefront Floor Offices                                   | 10         |
| Village Shops Ground Floor Storefront                                     | 25         |
| Aparthotel Suites   | 50         |
| Food Service - Coffee Shop, Ice Cream, Deli, Confectionary                | 4          |
| Restaurants   | <u>6</u>   |
| <b>Total 17 Acre &amp; Shadley Commercial / Residential Village Units</b> | <b>320</b> |

#### Village Parking

|  |            |
|--|------------|
| Under Village Parking                    | 250        |
| Residential Condo Under Building Parking | 80         |
| Residential Condo Outdoor Parking        | 80         |
| Surface Parking                          | 40         |
| Aparthotel Parking Garage                | <u>100</u> |
| <b>Total Village Parking Spaces</b>      | <b>550</b> |

#### Sugden Park Venues

|   |               |
|---|---------------|
| Performing Arts Center and Black Box                            | 75,000 Sq. Ft |
| Parking Under Performing Arts Center                            | 200 Spaces    |
| Performing Arts Center Parking Garage Parking                   | 316 Spaces    |
| Lakeside International Food Court and Dock                      | 10,000 Sq. Ft |
| Plaz Des Artists - 5 Alt Cinemas, 15 Artist Lofts, Exhibit Hall | 20,000 Sq. Ft |
| Plaz des Artist Parking Lot                                     | 239 Spaces    |
| Events Field and Fairground                                     | Open Field    |
| Botanical Gardens Exhibition Hall                               | 8,000 Sq. Ft. |

|  |           |
|--|-----------|
| Soccer Fields  | Open Area |
| Kids Playground  | Open Area |
| Palm Grove Park and Pond                               | Open Area |
| Boat Docks   | 3 Docks   |
| Sugden Park Green - Field and Performers Stage/ Gazebo | Open Area |
| Dog Park   | Open Area |
| <b>Total Sugden Park Building Units</b>                | <b>4</b>  |

### **BREAKDOWN OF APPROXIMATE SQUARE FEET OF CONSTRUCTION**

| <b><u>Commercial Village Ground Floor</u></b>        | Unit Size  | Total Sq. Ft. |
|--|------------|---------------|
| Food Shops 4 - Each 1,500 Sq. Ft.                    | 4 x 1,500  | 3,000         |
| Restaurants 3 - Each 2,000 Sq. Ft.                   | 3 x 2,000  | 6,000         |
| Restaurants 3 - Each 5,000 Sq. Ft.                   | 3 x 5,000  | 15,000        |
| Storefront Offices 10 Each 1,500 Sq. Ft.             | 10 x 1,500 | 15,000        |
| Storefront - 25 Small Retail Shops Each 1,000 Sq. Ft | 25 x 1,000 | 25,000        |
| <b>Total Ground Floor Foot Print - 64,500 Sq. Ft</b> |            | <b>64,000</b> |

| <b><u>Commercial Village Second Floor</u></b>        | Unit Size | Total Sq. Ft. |
|--|-----------|---------------|
| Office Suites 25 - Each 600 Sq. Ft.                  | 25 x 600  | 15,000        |
| Loft Condos Residential 40 - Each 800 Sq. Ft         | 60 x 800  | <u>48,000</u> |
| <b>Total Second Floor Foot Print - 63,000 Sq. Ft</b> |           | <b>63,000</b> |

| <b><u>Commercial Village Third Floor</u></b> | Unit Size | Total Sq. Ft. |
|--|-----------|---------------|
| Loft and Condos 40 Each 1,000 Sq. Ft.        | 40 x 1000 | <u>40,000</u> |
| <b>Total Third Floor 40,000 Sq. Ft.</b>      |           | <b>40,000</b> |

| <b><u>Commercial Village Fourth Floor</u></b> | Unit Size  | Total Sq. Ft. |
|---|------------|---------------|
| Penthouse Loft Condos 20 Each 1,200 Sq. Ft.   | 20 x 1,200 | <u>24,000</u> |
| <b>Total Fourth Floor 30,000 Sq. Ft.</b>      |            | <b>24,000</b> |

| <b><u>Residential Village -Totals</u></b>     | Unit Size  | Total Sq. Ft. |
|---|------------|---------------|
| Total Construction Sq. Ft. 80 Units x 1,200   | 80 x 1,200 | 96,000        |
| Total Number of Condos in Residential Village |            | <b>80</b>     |

**Aparthotel and Parking Garage**

|   |          |           |
|---|----------|-----------|
| Total Construction Aparthotel Sq. Ft. 50 X 900 x 3 Floors | 50 x 900 | 45,000    |
| Parking Garage 100 Cars                                   |          | 30,000    |
| Total Number Aparthotel Units 50                          |          | <b>50</b> |

**Construction in Sugden Park**

|   |  |                |
|---|--|----------------|
| Performing Arts Center  |  | 75,000         |
| Lakeside International Food Court and Dock                      |  | 10,000         |
| Plaz Des Artists - 5 Alt Cinemas, 15 Artist Lofts, Exhibit Hall |  | 20,000         |
| Botanical Gardens Exhibition Hall                               |  | <u>8,000</u>   |
| Total Sq. Ft Sugden Park  |  | <b>113,000</b> |

**17 ACRE CRA VILLAGE VERTICAL CONSTRUCTION COSTS AND SALE PRICES**

| <b>VENUE AND APPROXIMATE SALE PRICE</b>  | <b>Unit Rent<br/>Monthly</b> | <b>Unit Sale<br/>Price</b> | <b>Total Sale<br/>Price</b> | <b>Total Sq. Ft.<br/>Cost Sq. Ft.</b> | <b>Total<br/>Cost</b> |
|--|------------------------------|----------------------------|-----------------------------|---------------------------------------|-----------------------|
| <b><u>Food Shops 4 x 1,500 = 6,000 Sq. Ft.</u></b> @ rent \$20 Sq. Ft. 8 CAP       | 2,500                        | 375,000                    | 1,500,000                   | 6,000 x 80 GS                         | 480,000               |
| <b><u>Restaurants 3 x 2,000 = 6,000 Sq. Ft.</u></b> @ rent \$ 20 Sq.. 8 CAP        | 3,300                        | 500,000                    | 1,500,000                   | 6,000 x 80 GS                         | 480,000               |
| <b><u>Restaurants 3 x 5,000 = 15,000 Sq.</u></b> @ rent \$20 Sq.. 8 CAP            | 8,333                        | 1,250,000                  | 3,750,000                   | 15,000 x 80 GS                        | 1,200,000             |
| <b><u>Shops 25 x 1,000 Sq. Ft = 25,000</u></b> @ rent \$18 Sq.. 8 CAP              | 1,500                        | 225,000                    | 5,625,000                   | 25,000 x 80 GS                        | 2,000,000             |
| <b><u>Office Storefront 10 x 1,500 = 15,000</u></b> @ rent \$20 Sq.. / 8 CAP       | 2,500                        | 375,000                    | 3,750,000                   | 15,000 x 80 GS                        | 1,200,000             |
| <b><u>Second Floor Office 25 x 600 = 15,000</u></b> @rent \$15 Ft / 8 CAP          | 750                          | 112,500                    | 2,812,500                   | 15,000 x 80 GS                        | 1,200,000             |
| <b><u>Second Floor Condos 30 x 800 SQ. Ft</u></b> Unit Price 180,000 / 6 CAP       | 900                          | 180,000                    | 5,400,000                   | 24,000 x 110                          | 2,640,000             |
| <b><u>Second Floor Condos 30 x 800 SQ. Ft</u></b> Unit Price 240,000 / 6 CAP       | 1,200                        | 240,000                    | 7,200,000                   | 24,000 x 125                          | 3,000,000             |
| <b><u>Third Floor Condos 40 x 1,000 Sq. Ft.</u></b> Unit Price 280,000 / 6 CAP     | 1,400                        | 280,000                    | 11,200,000                  | 40,000 x 130                          | 5,200,000             |
| <b><u>Fourth Floor Condos 20 x 1,200 Sq. Ft</u></b> Unit Price \$320,000 / 6 CAP   | 1,600                        | 320,000                    | 6,200,000                   | 24,000 x 135                          | 3,240,000             |
| <b><u>Residential Condos 80 x 1,250 Sq. Ft.</u></b> Unit Price \$ 295,,000 / 6 CAP | 1,475                        | 295,000                    | 23,600,000                  | 100,000 x 135                         | 13,500,000            |
| <b><u>Aparthotel 50</u></b> @ rent \$200 night x 50% Net 1,800,000 RENT            | 36,000                       | 360,000                    | 18,000,000                  | 40,000 x 150                          | 6,000,000             |
| <b>TOTALS</b>  |                              | <b>Total Revenue</b>       | <b>89,037,500</b>           | <b>Build Cost</b>                     | <b>40,140,000</b>     |



### **17 ACRE CRA VILLAGE TOTAL ESTIMATED COST**

|  | <b>Cost</b>       |                                |
|--|-------------------|--------------------------------|
| Land Purchase 17 Acres CRA                                 | 3,200,000         |                                |
| Shadley Property   | 900,000           |                                |
| Re Zone  | 100,000           |                                |
| Site Clearing  | 150,000           |                                |
| Site Development 10 Acres x 150,000 Acre                   | 1,500,000         |                                |
| Architectural Design                                       | 650,000           |                                |
| Engineering  | 650,000           |                                |
| Impact Fees 320 Units x 10,000 (Reduced)                   | 3,200,000         | (County to Reduce Impact Fees) |
| Permits 320 Units x 2,000 (Reduced)                        | 640,000           | (County to Reduce Permit Fees) |
| <b>Total Build Cost</b>                                    | <b>40,140,000</b> |                                |
| Public Areas / Plazas                                      | 1,500,000         |                                |
| Under Village Parking 250 Spaces                           | 1,500,000         |                                |
| Aparthotel Parking Garage 100 Spaces                       | 1,500,000         |                                |
| Residential Condo Inside Parking 80 Spaces                 | 400,000           |                                |
| Residential Exterior Surface Parking 80 Spaces             | 150,000           |                                |
| Allowance for Construction Funding 15,000,000 x 8% x 2 yr. | 2,400,000         |                                |
| Contingency Fund / Misc Costs                              | 2,000,000         |                                |
| Sales Commissions and Marketing Costs (\$60,000,000 x 5%)  | 3,000,000         |                                |
| Closing Costs \$60,000,000 x 1.5%                          | <u>900,000</u>    |                                |
| <b>Total Cost</b>  | <b>64,480,000</b> |                                |

### **17 ACRE CRA VILLAGE PROJECTED PROFIT**

|  |                   |
|--|-------------------|
| Total Revenue / Value of New Construction              | 89,037,500        |
| Less Total Cost of Project - Land / Build / Soft Costs | <u>64,480,000</u> |
| <b>17 ACRE CRA Estimated Profit</b>                    | <b>24,557,500</b> |

|   |            |
|---|------------|
| Project Development Time                        | 36 Months  |
| <b>Estimated ROI \$24,557,500 / \$64,480,00</b> | <b>38%</b> |

**SUGDEN PARK IMPROVEMENTS - COST ESTIMATE AND FUNDING SOURCES**

Attached Projection Are Only Estimates

Final Size and Budget of Each Venue To Be Determined

All Venues in Sugden Park to be Funded Via Private Donations

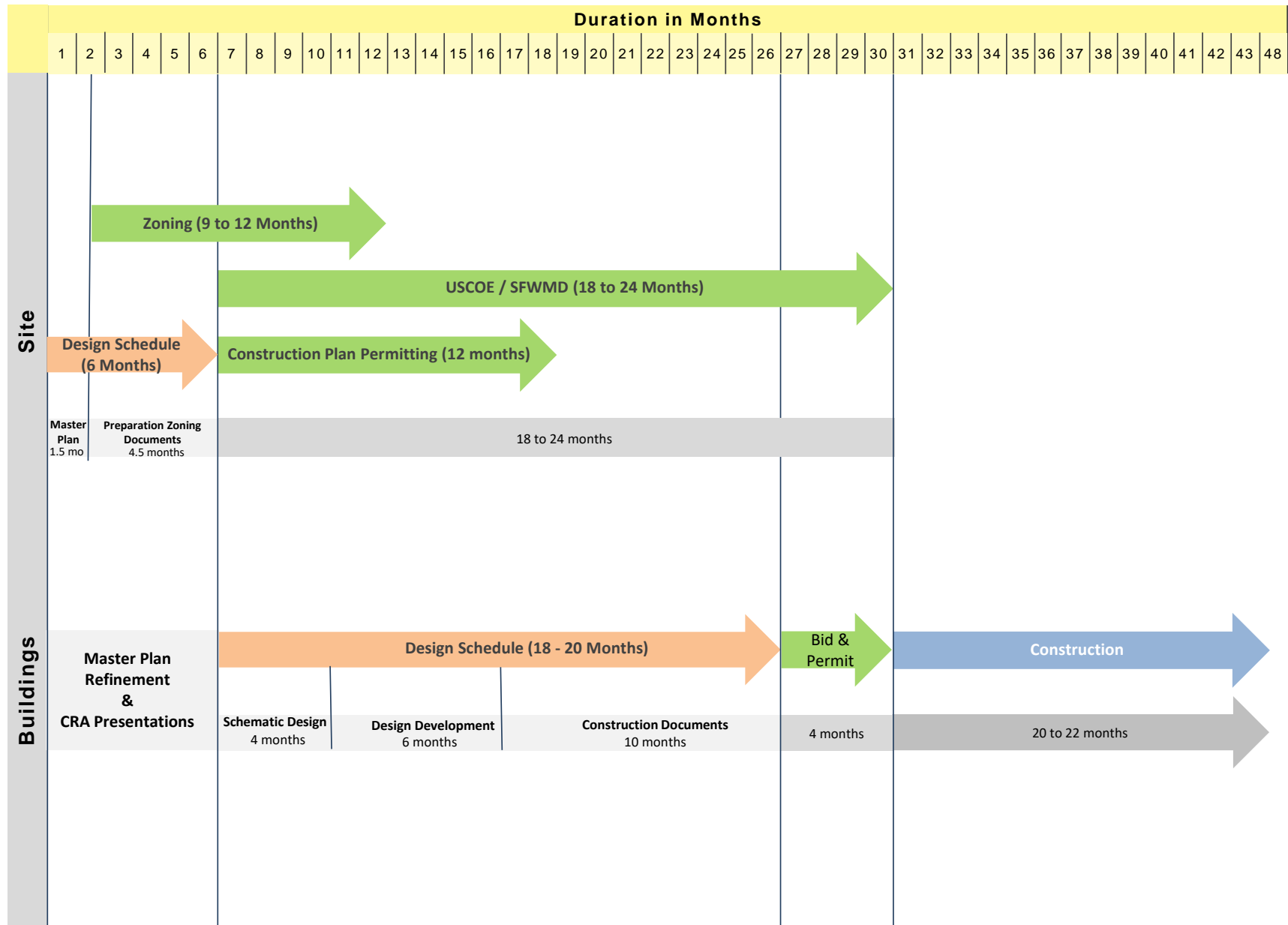
Parking to be funded by County

| <b>Proposed Sugden Park Facilities / Funded By</b>                 | <b>Est. Cost</b>  | <b>VPAC</b>       | <b>Donors</b>    | <b>County</b>    |
|--|-------------------|-------------------|------------------|------------------|
| Performing Arts Center   | 39,000,000        | 39,000,000        | 0                | 0                |
| Black Box and Out Facilities                                       | 6,000,000         | 6,000,000         | 0                | 0                |
| Parking Garage and Spaces  | 5,000,000         | 5,000,000         | 0                | 0                |
| Lakeside International Food Court and Dock                         | 2,000,000         | 0                 | 2,000,000        | 0                |
| Plaz Des Artists - 5 Alt Cinemas, 10 Artist Lofts, Exhibition Hall | 2,500,000         | 0                 | 2,500,000        | 0                |
| Botanical Gardens Exhibition Hall                                  | 1,500,000         | 0                 | 1,500,000        | 0                |
| Soccer Fields and Facility   | 1,600,000         | 0                 | 1,600,000        | 0                |
| Events Field and Fairground  | 350,000           | 0                 | 350,000          | 0                |
| Kids Playground  | 200,000           | 0                 | 200,000          | 0                |
| Palm Grove Park and Pond   | 150,000           | 0                 | 150,000          | 0                |
| Boat Docks   | 150,000           | 0                 | 150,000          | 0                |
| Sugden Park Green - Field and Performers Stage/ Gazebo             | 350,000           | 0                 | 350,000          | 0                |
| Dog Park and Walk  | 50,000            | 0                 | 50,000           | 0                |
| Sugden Parking   | <u>1,500,000</u>  | <u>0</u>          | <u>0</u>         | <u>1,500,000</u> |
| <b>Estimated Total Cost</b>  | <b>60,350,000</b> | <b>50,000,000</b> | <b>8,850,000</b> | <b>1,500,000</b> |

**Disclaimer: This SUMMARY PROFORMA and all its projections are only preliminary estimates. Actual costs are subject to final construction plans and may vary significantly.**

# 6. Timeline

Final schedule subject to UCOE review and permitting



## 7. Developer Proposal

Banroc Forge has an agreement with its strategic development partner - Florida Drywall Inc. and its principal Aldo Coviello to provide the cash funds to purchase the 17-Acre Tract outright for cash. **(A certification letter from TD Bank is available upon request.)**

BanrocForge also has multiple, private equity and banking sources in place to fund the complete project. Primary among these are Forge Development and Avison and Young.

Banroc Forge hereby offers to purchase the 17-Acre Bayshore CRA Property for the sum of \$3,200,000 in cash. Terms of the purchase would include:

### **FEE SIMPLE LAND PURCHASE CONTRACT**

A simple vacant land purchase contract - \$3,200,000 cash at closing

Initial earnest money deposit upon signing purchase contract - \$320,000

Due diligence period:

**Under Option A** - Until Banroc Forge obtains re zone for 240-Unit Mixed Use PUD and approval to place Performing Arts Center on 17-Acre tract

**Under Option B** - Until Banroc Forge obtains re zone for 320-Unit Mixed Use PUD and approval from Collier County for a 99-year lease at a token price of \$100 per year for four (4) acres of Sugden Park land upon which to build the VPAC Performing Arts Center, Black Box, and Parking Garage

### **ADDITIONAL TERMS**

Regarding the 250 car parking garage under Bayshore Village and the 100 car garage in the Aparthotel building, Banroc Forge is requesting some form of financial assistance from the County or City for the funding needed to build the parking garages.

Regarding the Plaz des Artists Alternative Cinema and the International Food Court, Banroc Forge proposes Sugden Park grant a similar 99 year lease to Banroc Forge who in turn will seek private funding and to build and manage the facilities.

Regarding the Botanical Gardens Exhibition Hall, Banroc Forge proposes Sugden Park grant a similar 99 year lease to the Botanical Gardens who in turn with the help of Banroc Forge will seek donations to build and manage the facilities.

Regarding the other proposed improvements and venues in Sugden Park (soccer fields, kid's playground, Park Green, beach and other proposed improvements), Banroc Forge firmly believes that it can obtain funding for each of the improvements via private donations from local citizens. Banroc Forge would design and build those facilities.

Regarding the additional surface parking spaces needed in Sugden Park, Banroc Forge proposes the County and Collier County Parks provide the funding for those. An option would be to also obtain donations from private citizens.

## 8. Closing Statement

### FROM LEAD DEVELOPER - HARRY BANDINEL

As the lead developer and creator of this proposed project, I attempted to design and create a unique facility that will be transformational for Bayshore and a benefit for all of Collier County and its residents.

The proposed Bayshore Arts Village and Sugden Park Project will provide a unique facility for all kinds of activities and events that Naples is currently lacking. It will promote art, culture and sports. It will provide a special place that will unite family and friends in a healthy and beautiful environment. It will also provide revenue and promote tourism for Naples and Collier County.

Given the significant, ambitious and transformational aspects of this project and the impact it will have on the local Bayshore community and my past experience with similar projects, I feel it will be important to protect and provide benefits to existing residents and businesses of the Bayshore community.

A project like this will provide the opportunity to be the catalyst to develop a community wide "beautification and enhancement program" by directly engaging all local residents and businesses of Bayshore to improve and clean up their properties.

The construction of the new Bayshore Arts Village, the VPAC Performing Arts Center and all the improvements to Sugden Park will develop a sense of pride of community for residents, property and business owners in Bayshore and increase the value of their properties and businesses.

I strongly propose to implement a comprehensive community wide "clean up and beautification effort" that should be a joint effort between the new developers, the Bayshore CRA, the City of Naples and Collier County. Banroc Forge has many ideas to propose in this regard.

Ultimately for all this to be a lasting success will require that the Bayshore area as a whole becomes a successful community. To that end Banroc Forge will be working actively with the residents and businesses of the Bayshore community.

I also ask for the full assistance and participation of the Bayshore CRA, Collier County PSD Parks and Recreation, the City of Naples and Collier County to help us implement our ideas and proposals that will ensure the long term success of the whole community. I am a firm believer in the word TEAM - Together Each Achieves More. Only as a team we can do this.

I would like to extend a special thank you to all who have contributed so much to this effort.



Harry Bandinel  
President

BANROC Corporation  
837 Fifth Avenue South  
Naples FL 34104

Phone: (941) 716-0720  
E-Mail: Harry@BanrocCorp.com



A bright blue sky with scattered white clouds. The clouds are of various sizes and shapes, some appearing as soft, fluffy masses and others as wispy streaks. The overall scene is bright and clear, suggesting a sunny day.

# **B. Exhibits & Project Imagery**

# OPTION A CONCEPTUAL SITE PLAN



- 1 Opera Hall
- 2 Black Box Theater
- 3 Arts Village
- 4 Board Walk
- 5 Shops/Condos
- 6 Parking



# OPTION B CONCEPTUAL SITE PLAN

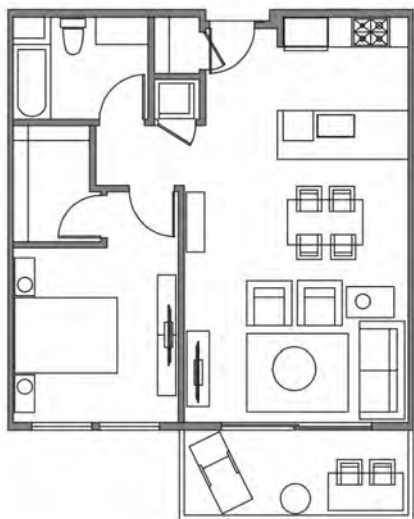




Renderings shown for illustrative purposes related to scale and density.  
Final design and architectural style to be developed in collaboration with project stakeholders.



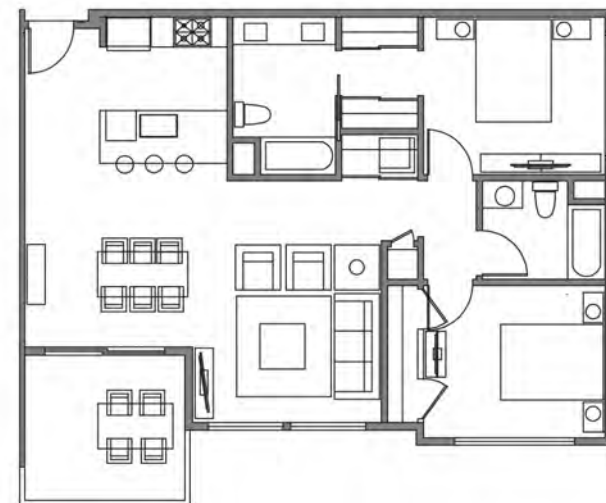
# HOUSING UNIT PLAN LAYOUTS



**1 BR/1B**  
**740 sf**

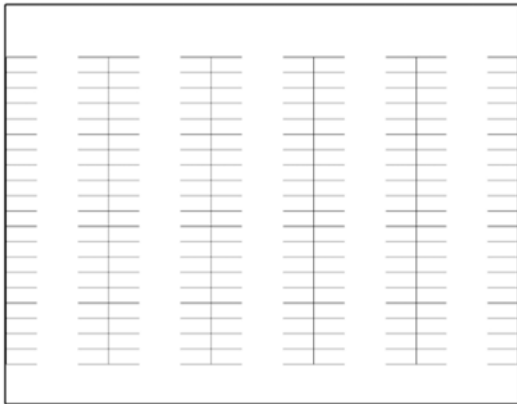


**1 BR Loft**  
**780 sf**



**2 BD/2B**  
**1060 sf**

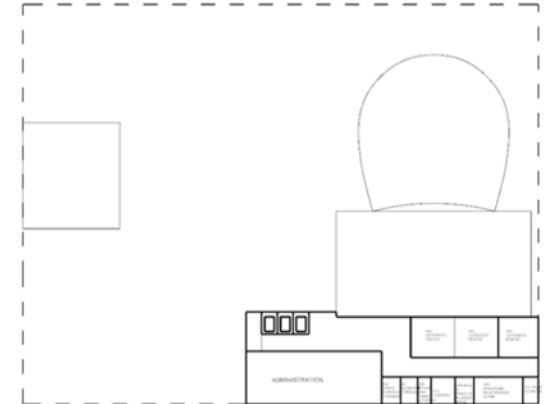
# PERFORMING ARTS CENTER TEMPLATE LAYOUTS



Level 01

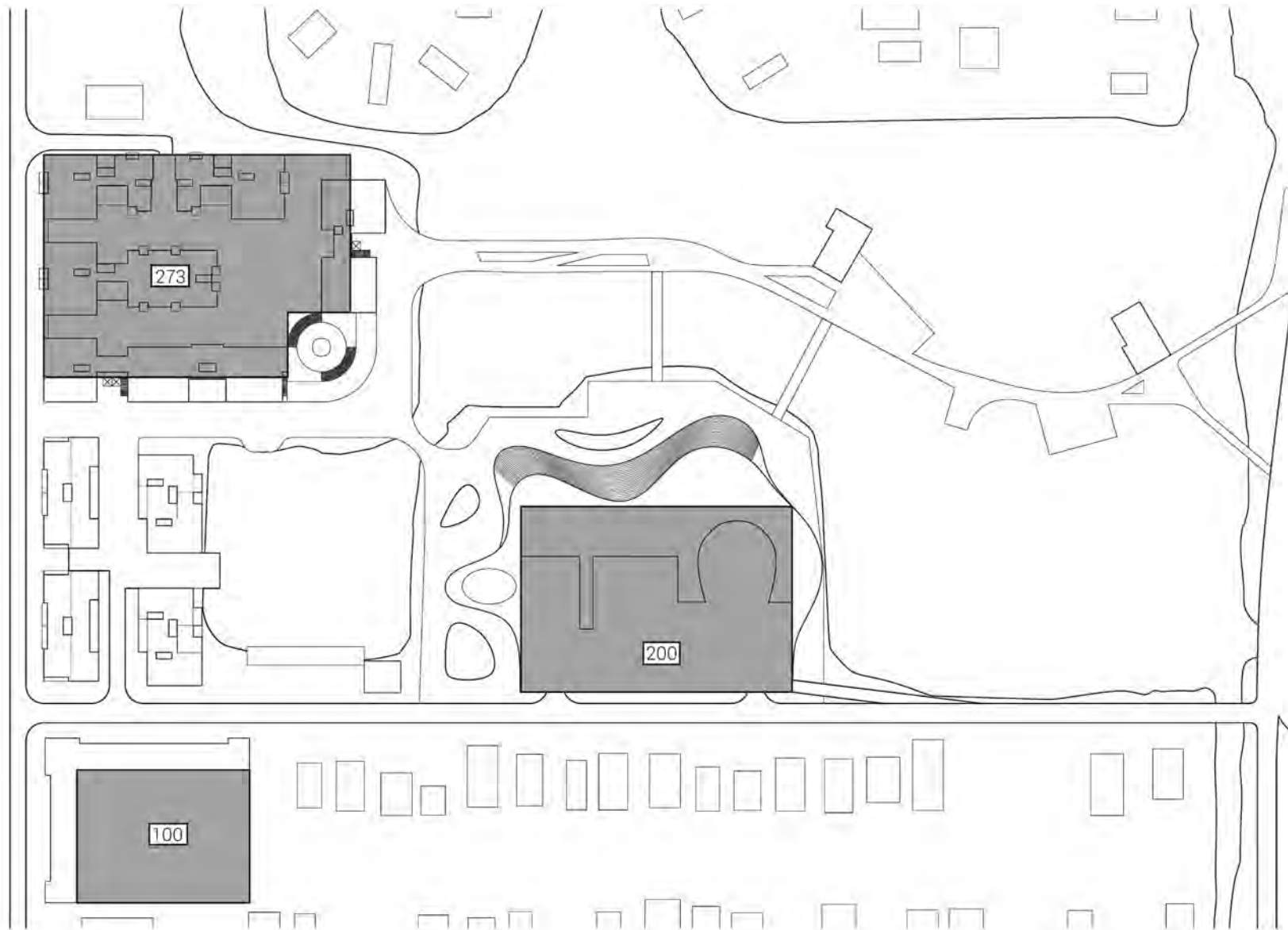



Level 02



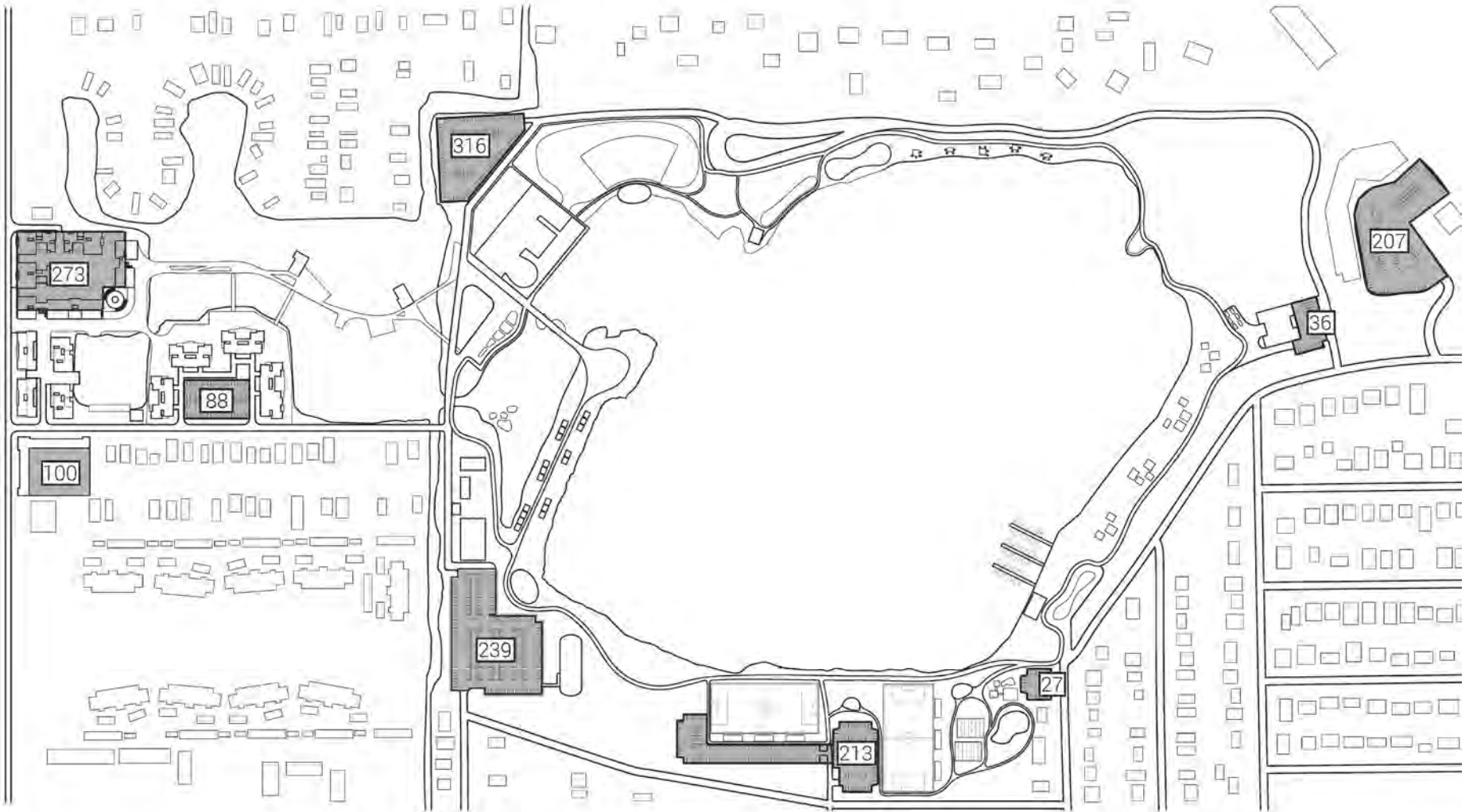
Level 03

# OPTION A - PARKING SPACES



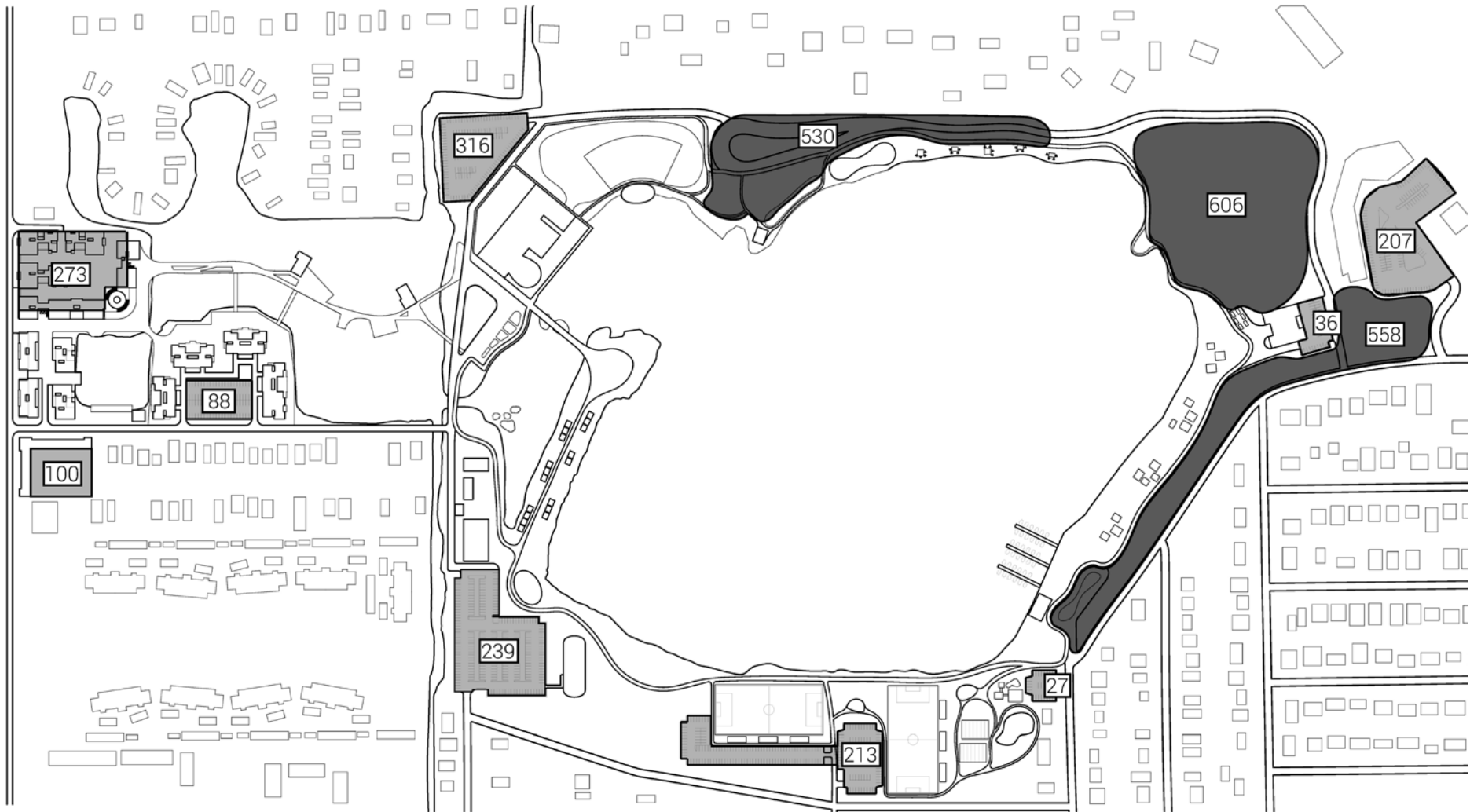
Option A - Parking Spaces  
573 Total  
200 ft 

# OPTION B - PERMANENT PARKING SPACES



Option B - Permanent Parking Spaces  
1499 Total  
200 ft ———

# OPTION B - EXPANDED PARKING FOR MAJOR EVENTS



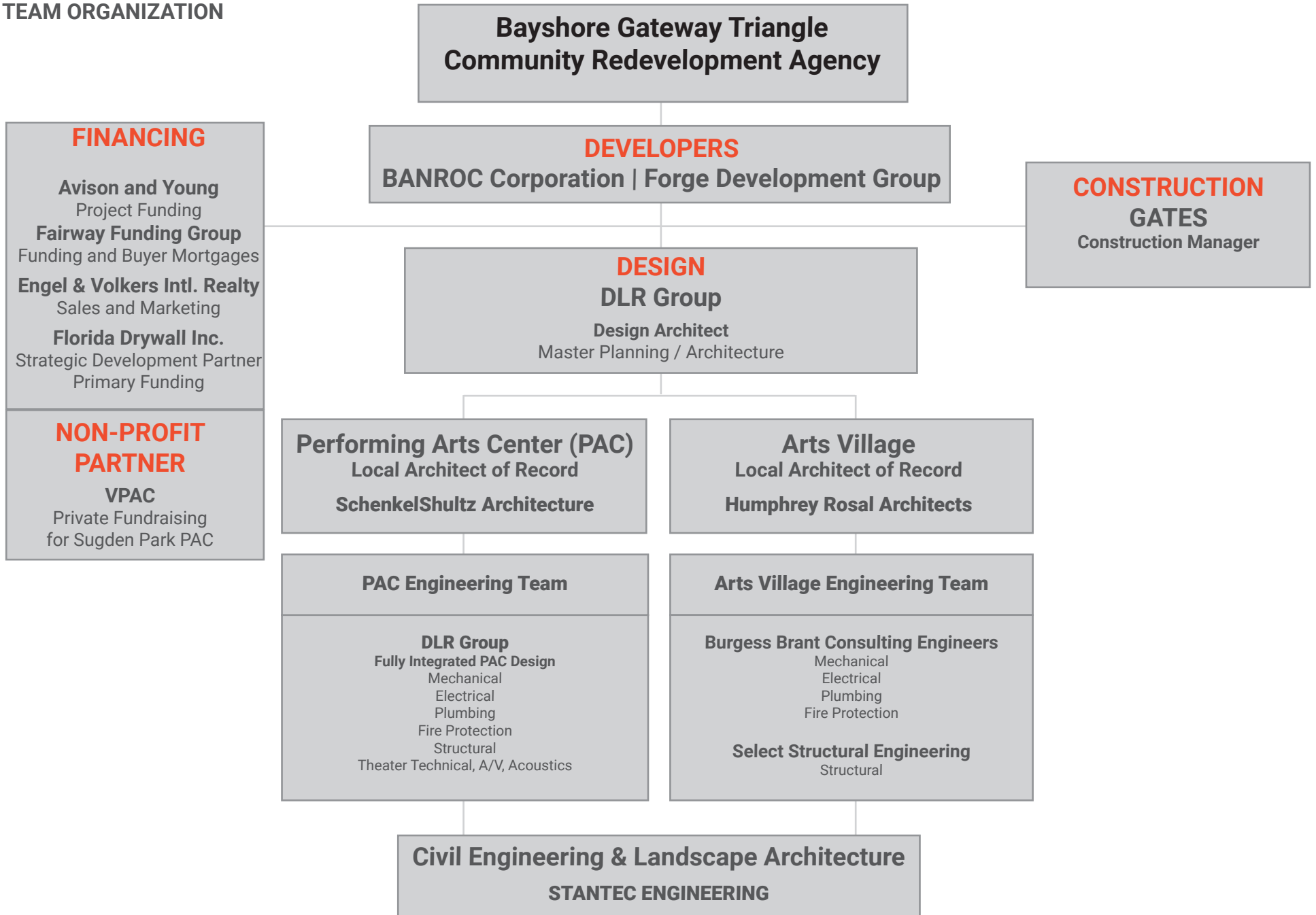
Option B2 - Expanded Parking for Major Events  
3193 Total  
200 ft ———





# C. Team Experience

**TEAM ORGANIZATION**



# C. Team Experience

## Introduction

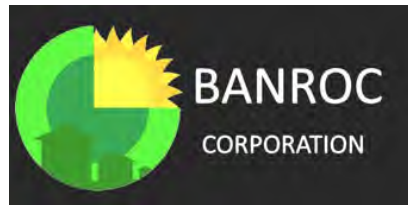
The Banroc Forge Development Group has assembled highly experienced team of companies who will provide the full scope of capabilities to take the 17 Acre Parcel from initial design to final owner occupancy. The Banroc Forge team of core companies listed on the organizational chart and below has worked together for the past three months to create the attached proposal and answer to the County's ITN.

Below we identify the full team. As requested, we have provided the office and contracting authority location(s) and authorized signor for each firm as well as a list of key personnel who would be involved in the project. Brief firm qualifications, including a representative project portfolio and key personnel resumes, follow.

## Office Locations and Key Personnel

### Developer

BANROC Corporation  
837 Fifth Avenue South  
Naples, FL 34102



Harry Bandinel, President  
(941) 716-0720 (mobile)  
harry@banroccorp.com

### Developer

Forge Development Group  
840 W. Hamilton Street, Suite 620  
Allentown, PA 18101



Andy Baldo, Co-Founder  
(610) 398-2988  
abaldo@ForgeDG.com

### Construction Manager

GATES  
275 Riverview Center Blvd., Suite 205  
Bonita Springs, FL 34134



John A. Hayes, Project Executive  
239.593.3777  
jhayes@gatesinc.com

#### Key Personnel:

- John A. Hayes, Project Executive
- David Tropf, Senior Project Manager
- Thomas McQueary, Director of Pre-Construction & Estimating
- Curtis Rimes, Senior Superintendent
- Becky Craig, Permit Expediter / Project Coordinator

**Design Architect (PAC & Arts Village)**  
**MEP & Structural Engineer (PAC)**  
**Performance Technology (PAC)**



DLR Group (a Florida corporation)  
(contracting authority)  
100 East Pine Street, Suite 404  
Orlando, FL 32801-2761

(primary location of design team)  
1202 Broadway, Suite 1006  
New York, NY 10001

Paul E. Westlake, Jr., FAIA, VP  
(216) 623-7868  
pwestlake@dlrgroup.com

DLR Group Key Personnel:

- Tom Gallagher, AIA, Principal in Charge, Lead Designer - PAC\*
- Laura Dulski, LEED AP BD+C, Project Manager - Housing\*
- Paul Westlake, FAIA, Lead Programmer - PAC
- Faraaz Mirza, LEED AP, Lead Designer – Arts Village
- Noah Steffes, RA, LEED AP, Project Manager\*
- John Adamek, RA, Job Captain
- Jason Majerus, PE, LEED AP BD+C, Lead Mechanical Engineer – PAC\*
- Arlene Parker, PE, LEED AP, Lead Electrical Engineer - PAC
- Murad Hamdallah, SE GGP, Lead Structural Engineer – PAC
- Wes Calkin, Theater Technical - PAC\*
- Johnathon Hopkins, Acoustician - PAC\*
- James Krumhansl, Audiovisual - PAC
- Raymond Heintel, Lowe Voltage / IT / Security - PAC
- Yosuke Hiraiwa, Lighting Designer - PAC

\*resume included

**Local Architect of Record (PAC)**

SchenkelShultz Architecture  
36-6 Enterprise Avenue, Suite 231  
Naples, FL 34104

Ron Reitz, Principal  
(239) 330-4592  
rreitz@schenkelshultz.com

Key Personnel:

- Ronald E. Reitz, AIA, LEED® AP – Design Principal
- Daniel C. Laggan, AIA – Partner-in-Charge
- Gary F. Krueger – Project Manager
- Brook K. Sherrard, AIA, LEED® AP – Project Architect
- Gary Porter – Technical Support



**Local Architect of Record  
(Arts Village)**

Humphrey Rosal Architects  
3200 Tamiami Trail North, Suite 300  
Naples, FL 34103

David Humphrey, President  
(239) 263-4201  
dhumphrey@humphreyrosal.com

Key Personnel:

- David Humphrey - Principal in Charge
- Randy Rosal - Partner, Project Designer, Architect
- Todd Lausterer - Project Architect, Production Manager



**Civil Engineer &  
Landscape Architect**

Stantec Engineering  
5801 Pelican Bay Blvd #300  
Naples, FL 34108

Tim Hancock  
(239) 649-4040  
tim.hancock@stantec.com

Key Personnel:

- Tim Hancock, AICP – Senior Planner
- Jared Beck, AICP – Senior Planner
- Kevin Mangan, ASLA – Landscape Architect
- Michael Herrera, PE – Civil Engineer
- Jeff Perry, AICP – Transportation Planner



### MEP Engineer (Arts Village)

Burgess Brant Consulting Engineers  
12995 South Cleveland Avenue #229  
Fort Myers, FL 33907

Mark Brant  
(239) 770-5680  
mbrant@burgessbrant.com

Key Personnel:

- Mark A. Brant, PE
- Joseph W. Broughton, PE

### SELECT STRUCTURAL Structural Engineer (Arts Village)

Select Structural  
12573 New Brittany Blvd.  
Fort Myers, FL 33907

Shawn Anderson, PE SE, President  
(239) 210-5074 Direct  
(239) 839-4894 Mobile  
shawn@selectstructural.com

Key Personnel:

- Shawn Anderson, PE, SE - Lead Structural Engineer
- Scott Lewkowski, PE - Structural Engineer



### Project Funding

Avison and Young  
1166 Ave of the Americas, 15th Floor  
New York, NY 10036

Charles Kingsley and Jon Epstein  
Principals, Investment Sales  
(212) 729-7140  
avisonyoung.com

### Buyer Mortgages

Fairway Funding Group  
8235 Natures Way  
Lakewood Ranch, FL 34202

Joe Lepiscopo  
NMLS#: 648748  
(941) 330-6669  
Joe@FairwayFundingGroup.com

### Sales and Marketing Real Estate Investment Funders

Engel & Volkers Naples Bonita-Estero  
837 Fifth Avenue South, Suite 102  
Naples, FL 34102

Harry Bandinel  
(239) 692-9449







Banroc Corporation is a Florida based real estate development, marketing, and consulting company. Banroc’s core competency is to provide any person or entity who is seeking to develop a lot or tract of land with the full spectrum of services needed to take the property from initial owner concept to final end user occupancy.

Banroc looks for outstanding properties and real estate projects, works with its investor base to secure the funding and then coordinates and manages the complete property development process. To provide these capabilities Banroc has created a large and diverse network comprised of the best professionals and leading companies in each field. Working together as a Team these companies provide the necessary expertise to complete any project.

**Banroc’s network includes:**

- |  |   |
|--|---|
| 1. Land planners                                   | 9. Experts in “Green” and Sustainable Design and Construction |
| 2. Attorneys                                       | 10. Landscape Designers                                       |
| 3. Experts in Property Zoning                      | 11. Private Equity and Bank Funding Sources                   |
| 4. Site and Project Planners                       | 12. Mortgage Brokers  |
| 5. Project Proforma and Financial Analysis Experts | 13. Sales and Marketing Professionals                         |
| 6. Engineers and Architects                        | 14. Social Media and Online Marketing Experts                 |
| 7. Construction Contractors and Builders           | 15. Top Producer Real Estate Agents                           |
| 8. Interior Designers, LEED Certifiers             |   |

Banroc’s network of companies and professionals has been carefully selected and are among the best in their field. Our network provides the unique ability to work as a “Team” and create unique and forward thinking options for the design and development of our client’s properties.

Furthermore this Team effort means Banroc works as a “one stop shop” with everyone working under one roof. This greatly simplifies and streamlines the whole design, construction and marketing process and results in a superior product at significant savings for our clients. If you are in need of any of our service please contact us. We guarantee to respond within 24 hours.



# Harry Bandinel

Principal and CEO, Banroc Corporation

## Real Estate Development and Marketing Consultant



### Education / Personal

Degree Business Management; Degree Architectural Engineering; Real Estate Sales License Florida, California and Texas; Held Florida Certified Residential Building Contractors License; NASDAQ Licensed Broker and Brokerage Principal; Financial and Investment Advisor; High School Aiglon College, Switzerland; Attended Cornell University in New York.

**Fluent in English, Spanish and German;** grew up in Monte Carlo, Cannes, Costa Rica and Switzerland; travelled to 72 countries worldwide; Honorary Member National Geographic Society.

**Resident in Florida since 1989;** active in residential and commercial real estate marketing, sales and development in Tampa, St Petersburg, Sarasota, Venice, Ft Myers, Cape Coral, Naples and Miami.

**Negotiated and transacted over \$305 million in commercial and residential real estate** in Florida, California, Texas, North and South Carolina, Spain, Portugal, Mexico, Costa Rica, Venezuela, Nicaragua and Australia.

### Current Work

**Principal and CEO of Banroc Corporation,** a real estate development and consulting company sourcing unique and forward thinking real estate projects. Provide the full spectrum of services to take any real estate project from initial concept to end user occupancy. Created and manage an extensive network of real estate funding, design, construction and marketing professionals to provide these services.

**Principal and managing partner at Leed Development Corporation and Futura Homes Corporation,** both companies dedicated to the development of "Green" and sustainable and affordable residential real estate projects.

**Founder and Director of the Florida Green Development Group,** a consortium of leading architects, engineers, land planners and sustainable development experts dedicated to designing, building and marketing "Green" and sustainable Leed Certified projects.

**Active as a licensed Realtor in Florida** since 1990; currently licensed with Engel & Volkers Naples; provide consulting services for foreign real estate investors; provide expertise in land acquisition, rezoning, property entitlement



# Harry Bandinel

continued

and development; active member of National Association of Realtors, the Florida Association of Realtors and the Naples Board of Realtors.

**Working directly with the developer of 875 Sixth Avenue Condominium project in downtown Naples**, a 20 million dollar ultra-luxury condo project located just off Fifth Avenue South in downtown Naples.

**Working under an MOU with VPAC, CAPA and Opera Naples** to source a suitable site and then design and build a 50 million dollar 900 seat Performing Arts Center in Naples.

**Founding partner in Futura Homes Corporation** a Florida real estate development company dedicated to designing and building affordable single family homes in Lehigh Acres and Goldengate Estates. Created a no-money down program with Fairway Funding Group to specifically targeting renters and provide renters the opportunity to own a home with no money down and for same monthly payment as their current rent. Based upon marketing results projections are to build over 100 homes per year.

**Working in partnership with Gates Construction** to build townhomes in recently started Babcock Ranch Development; a new "Green" and sustainably built 30 thousand acre community; the first fully solar powered city in the USA.

## Past Work Experience

**Partner and Project Acquisitions Director - K JIMS Development** - a Florida land development company; sourced, negotiated purchase of 45 million dollars of vacant land / lots in Clearwater, Ocala, Orlando, Tampa, St Petersburg, Dunedin, Marco Island, Naples, Siesta Key and Sarasota. Rezoned and entitled the properties, created and designed master plans, homes and buildings for the properties.

**Involved in the acquisition and planning for several Assisted Living Projects** in The Villages Ocala, in Sarasota, in St Petersburg and in Naples. Designed and built two \$3.5 Million dollar homes on Marco Island and Siesta Key. Project Construction Manager at Waterford Subdivision in Venice, Florida, a 250 home golf course community.

**Founder and Managing Partner of Bradley Financial Group**, NASD licensed brokerage firm in Miami and Chicago. Directly supervised a team of 120 licensed brokers; had full financial responsibility for the oversight of 3,000 client accounts including all investment recommendations; directed the company's NASD / CFTC compliance requirements and oversaw company's bi-annual NASD / CFTC regulatory audits; as the CEO and Principal of a NASD licensed Brokerage passed extensive national and international FBI and Interpol background checks.

**Apartment Acquisitions and Remodeling Specialist for Merrill Lynch Realty - REITS Division in California**; sourced over 5,000 apartment units; supervised the remodeling and refurbishing to prepare and sell to REITS. Investment advisor and director for acquisitions for a private German investment group purchasing and refurbishing over 55 million dollars in residential and commercial properties in Puerto Banus and Marbella, Spain.

**Remodeled 18 single family homes in North / South Carolina as investments for my own account while studying architectural engineering at college.**

Developed a 24 home residential subdivision in Austin, Texas, included rezoning of land, site design and complete construction of all homes. Partner in Carolandia S.A, a real estate development and construction company in Costa Rica.; directed and managed the design, construction and sale of 35 single family custom luxury homes in Costa Rica.

**Managed the development of a 350 acre beachfront property in Flamingo Beach, Costa Rica**; included site design, land planning and subdivision, lot platting and the supervision of road, water, sewer and power facilities construction.

**Supervised the development of a 2,000 acre beachfront property in Nosara Beach, Costa Rica**; it was the first ever PUD development in Costa Rica and is still one of the best examples of environmentally sustainable development in the country.

## OUR DEVELOPMENT SERVICES

- Site Evaluation
- Due Diligence
- Land Acquisition
- Entitlements & Government Approvals
- Local, State and Federal Economic Incentive Management
- Financial Analysis
- Equity Participation
- Project Financing

## OUR CLIENT. THEIR OBJECTIVES.

Our Clients include public and private sector entities responsible for major capital construction projects.

**LEVERAGE** entrepreneurial discipline; Manage risk

**IMPROVE** efficiency of the capital project delivery process

**ACCOUNTABILITY** for capital expenditures throughout project life cycle

**AVOID** project delays and cost overruns; Maximize performance results

**SECURE** independent evaluation / oversight of program metrics & performance

**OUR MISSION** is to deliver superior quality, customized real estate development services with integrity to our select group of partners in a transparent, ethical manner.



Forge Development Group LLC, founded by two industry veterans, is a full-service real estate investment and development company managing select office, medical, industrial and land development projects on behalf of the principals of Forge as well as third-party real estate investors and owners.

We work with you to fully understand all aspects of your real estate development needs. From site evaluation to navigating municipal approvals to securing financing, our team of experienced real estate developers is with you from project inception to completion.

Forge is strategically aligned to deliver on major construction and development projects in Florida via its well-established relationship with Gates. Gates and the Forge principals have been working together for more than 10 years, successfully completing high profile projects in Southwest Florida. We collectively strive to manage financial risk, incorporate flexible design and implement innovative building techniques that decrease operational costs.

Our team possesses deep expertise in fast-track development, strategy, construction and structured financing. Utilizing this expertise, we provide strategically-positioned real estate opportunities for a broad set of diverse clients.

# The Residences at Sapphire Lakes

Collier County, FL



The project has been designed as an institutional-grade senior living building that will provide progressive levels of care for persons requiring assisted living and memory care. The Project is a new 127-unit facility with assisted living (65 units) and memory care (62 units) facilities to be constructed on a site of approximately 5.3 acres located at 8001 Radio Road Naples, Collier County, Florida. The site is currently controlled by the Sponsor.

The building itself is based on the design and construction experience of Development Consulting gained in the development of a similar, recent and very successful project in Fort Myers, Florida, known as Discovery Village at the Forum.

Including construction, fees, design and engineering, pre-development costs, financing fees and other related "hard" and "soft" costs, the cost to achieve stabilized occupancy is expected to be approximately \$29,200,000.

It is anticipated that 14 months will be required to complete site work and all construction activities.

**Team Member Role(s):** Forge Development Group

# The Resort at Tranquility Lake

Cape Coral, FL



The resort is a luxury motor coach resort located in Cape Coral, Florida consisting of 275 units of motor coach lots with optional villas and other lot improvements. Additionally, community amenities benefit a 5-star luxury resort catering to the owners of motor coaches ranging in values from approximately \$250,000 to nearly \$3,000,000. The resort is situated on 188 acres of land surrounding a 90-acre pristine spring-fed lake.

The Resort is a unique motor coach destination in Florida, the only such resort meeting 5-star standards of design and operation, similar to only a handful of such 5-star resorts now located in southern California's Palm Springs area.

Each spacious custom motor coach lot will provide ample room for the largest motor coaches as well as optional villas and other lot improvements. The villas, like the rest of The Resort, are designed and built to luxury 5-star standards, with 600 square feet of living space, extensive optional garages, outdoor kitchens, outdoor decks, and even optional swimming pools or spas. Each villa comes equipped with one master bedroom and bath - indoor and/or outdoor kitchen - Great Room overlooking the lake or other lot frontage - and optional Loft areas that can be used for sleeping, office or den, or just storage.

**Team Member Role(s):** Forge Development Group

# Butz Corporate Center

Allentown, PA



The Butz Family has always been huge proponents of urban revitalization believing that a vibrant downtown is the key to continued redevelopment of Pennsylvania's third largest city, Allentown. In 2005, they made their commitment tangible by constructing a class-A office building to house their headquarters, as well as to attract additional businesses into Allentown's downtown. The first phase of the project was a public-private partnership with the Allentown Economic Development Corp.

In 2013, the Butz Family expanded the original Butz Corporate Center and has successfully leased 95 percent of the building with only retail space available on the first floor. This project also received assistance through RACP.

In 2015, the Butz Family broke ground on Phase 3 located in the former parking lot of the original Butz Corporate Center. The newest office building will include 55,000 SF of Class-A office space on seven floors.

**Team Member Role(s):** Forge Development Group

# St. Luke's Health Network

Bethlehem, PA



Forge Development Group completed the design, development and construction of a 21,000 SF, \$6,000,000 medical office building located near Bethlehem, Pennsylvania. The building consisted of family medicine, physical therapy, pediatric and laboratory suites

The biggest challenge of this project was the very aggressive schedule. Land development in Pennsylvania typically requires up to nine months to a year for procurement of all municipal approvals including the NPDES and Penn DOT permits. Approvals were obtained within four months from the execution of the Letter of Intent and construction commenced on 8/15/2014. A temporary certificate of occupancy for the family medicine suite was issued on 12/24/2014, allowing the occupying physician to schedule patient appointments starting 12/29/2014. The remaining suites were delivered on 1/26/2015 with a permanent certificate of occupancy, thus meeting St. Luke's requirement to keep its physician practices operational during a relocation with no down time.

**Team Member Role(s):** Forge Development Group

# Andy Baldo

Founder, Forge Development Group

## Co-Developer

Project Executive



### About Andy

Andy is a founding member of Forge Development Group and is responsible for all aspects of the business. He has over 25 years of real estate development, project and construction management, claims analysis, engineering and industry experience. Andy has managed the development and construction process for projects supporting over 3,000,000 SF of commercial, industrial, and health care related assets. Additionally he has managed the construction of over \$20,000,000 of infrastructure projects to support the developments land holdings.

During the initial 18 months leading Forge Development Group, he has sourced and financed over \$60,000,000 in real estate projects, which are currently in various stages of development, this projects include a \$30,000,000 Assisted Living Facility in Naples, Florida, a \$32,00,000 Luxury Motor Coach Resort in Naples Florida.

Prior to founding Forge Development Group, he was a Vice President of Arcadia Properties, LLC located in Bethlehem, Pennsylvania.

He also served as a Project Manager for a Top 400 ENR construction management firm. His projects included the construction of high tech manufacturing facilities, higher educational facilities, private schools, office buildings and financial institutions.

### Select Experience

A 40,000 SF medical and urgent care facility located in Parkesburg, Pennsylvania for the Lancaster General Health Network. The project included urgent care, MRI, women's health, physical therapy, pediatrics, and a family practice.

Proforma development, financing, design, development and construction of a 21,000 sf medical office building located near Bethlehem Pennsylvania for the St. Luke's Health Network. The Project included pediatrics, imaging, women's health, and physical therapy and laboratory services.

a 40,000 sf medical and urgent care facility located in Parkesburg, Pennsylvania for the Lancaster General Health Network.



### Professional Highlights

#### Education

B.A in Environmental Engineering  
Wilkes University

Wharton Management Program  
University of Pennsylvania



*Working with GATES was a wonderful experience. Throughout the entire process, the staff was helpful, professional and always available to address all of my concerns. The end result is a beautiful building that I am very proud of. The process was seamless and we formed a true partnership that I look forward to continuing on future buildings at Mirasol.*

Art Friedman, Director of Development,  
Paradigm Misasol, LLC

# GATES CONSTRUCTION

GATES was founded in 1993 as Southwest Florida began to come of age. As this new frontier was born so was the demand for high quality construction in virtually every market sector: commercial, multi-family, residential, retail, hospitality, industrial, institutional, healthcare and country club lifestyle projects. GATES was at the forefront as a general contracting and construction management firm, and quickly gained a reputation for quality construction and exceeding clients' expectations. Our diverse portfolio can be attributed to this growth in what was known at the time as "boom town." Through strategic planning and a team of highly experienced construction professionals, GATES has emerged from humble beginnings and is recognized today as one of the area's leading construction firms.

GATES is a full service construction management, general contracting and design-build firm with offices in Florida, North Carolina and the Republic of Panama. GATES has successfully teamed with Stantec and SchenkelShultz on many projects, including those with elements relevant to Bayshore Triangle CRA.

GATES Construction provides the project leadership that ensures results which accurately reflect our client's objectives. Many construction firms may appear comparable. However, the real difference is in the project delivery - the collaborative and cooperative way we work with the owner, architect, and other team members, combined with the in-depth experience we bring.

## **Our Services include:**

- Site Evaluation
- Permitting / Entitlements
- Design-Build
- Pre-construction
- Systems Analysis
- Design Review
- Budget Estimating
- Value Engineering
- Life-Cycle Cost Analysis
- Constructability Analysis
- Construction Scheduling
- Quality Control
- Cost Control
- Change Order Management
- Transition Planning
- Warranty

# Atrium at Aventura

Aventura, FL | Owner: GM Atrium, LLC



Two new 12-story condominium buildings with 192 units ranging from 1,205 - 3,867 SF with three atriums and lush, exotic greenery. Amenities include a 22-boat slip private marina and a boardwalk, two waterfront pools, Jacuzzi and sundeck; a fitness center with an exercise room; his and her steam and sauna rooms; a grand event salon and a business room, and under building parking.

**Team Member Role(s):** GATES Construction served as GC/CM for the project.

# Cameron Commons

Naples, FL | Owner: Owner: Cameron Partners, LLC



New one-story 39,067 SF building with retail and restaurant spaces ranging from approximately 1,800 to 6,500 SF. Initial tenants include Tropical Smoothie, Pelican Larry's, Sakura Buffet, Allstate, Aveda Salon, a dentist, and a doctor's office.

**Team Member Role(s):** GATES Construction provided general contracting services.

# Horizon Business Services

Naples, FL | Owner: Horizon Business Services



New Construction of a, award-winning, two-story office building for IT company requiring redundant power systems. The 11,276 SF building, which sits on a 26,000 SF site, features a 2,000 SF data center, a 600 kw backup generator, a second set of interior concrete walls surrounding the data center and high end finishes.

**Team Member Role(s):** GATES served as GC/CM for the project.



# Mirasol II Condominium

Estero, FL | Owner: Paradigm Mirasol, LLC



New Construction of five-story, 50-unit condominium over parking. The 211,491 SF building structure is a post tensioned slab with concrete block and stucco exterior walls. The project duration was 12 months and included all structure, framing, MEP, drywall, painting, trim and finishes.

**Team Member Role(s):** GATES served as GC/CM for the project.



# Miromar Outlet Mall

Estero, FL | Owner: Miromar Development LLC



Construction of high end outlet retail mall. The retail mall was built in multiple phases (61,000 SF - Phase IV | 66,000 SF - Phase V) and was occupied during construction.

**Team Member Role(s):** GATES served as GC/CM for the project.

**REPEAT CLIENT**

# Northbrooke Professional Village

Naples, FL | Owner: Stock Development



Phased construction of an upscale Class A professional office park consisting of six one and two-story buildings totaling 121,220 SF

**Team Member Role(s):** GATES served as GC/CM for the project.





### About John

As President and CEO of GATES Construction, John provides executive management oversight and support for all GATES projects. He negotiates Owner contracts and will participate in the Owner/Architect/Contractor meetings. He also reviews Weekly Reports and schedules for every GATES project. With 40 years of experience in the construction industry, John has played a key role in contributing to and assisting in management of the company's growth.

His diverse range of projects through the years has included retail, single and multi-family residential, restaurant and hospitality, mixed use, and recreation projects, among many others. A state licensed general contractor, Hayes has been involved in the industry as both the builder and developer.

### Select Experience

#### Atrium at Aventura Condominium - Aventura, FL

Two new 12-story condominium buildings with 192 units ranging from 1,205 - 3,867 SF with three atriums and lush, exotic greenery. Amenities include a 22-boat slip private marina and a boardwalk, two waterfront pools, a fitness center; a grand event salon and a business room, and under building parking.

#### Mirasol II Condominium - Estero, FL

New Construction of 5-story, 50 unit condominium. The building structure is a post tensioned slab with concrete block and stucco exterior walls.

#### Cameron Commons Retail Center - Naples, FL

Mixed use 1-story 39,067 SF building with retail, restaurant and office spaces. Initial tenants include Tropical Smoothie, Pelican Larry's, Sakura Buffet, Allstate, Aveda Salon, a dentist, and a doctor's office.

#### Eagle Lakes Community Center - Naples, FL

The 11,558 square-foot building includes fitness rooms, locker rooms, a game room, an early childhood education center, and meeting space to accommodate over 400 people. The Community Center offers VPK and summer camps for young children. The center also offers children's Zumba classes, fitness programs, gym memberships, cooking classes, yoga and wellness services.

#### Askar Retail Center - Bonita Springs, FL

This project involves the demolition of an existing building and the new construction of a 1-story retail building to accommodate up to 5 tenants and buildout of 1 restaurant tenant space.

#### Horizon Business Services - Naples, FL

New Construction of a 2-story, 11,276 SF office building for IT company featuring a 2,000 SF data center, 600 kw backup generator, a second set of interior concrete walls, redundant power systems and high end finishes.



### Professional Highlights

#### Education

BS Building Construction, High Honors  
Dunwoody Industrial College of Building Construction

#### Registration & Licensing

General Contractor  
Lic#: CGC1516270 & CGC047214

#### Professional Affiliations

Collier Building Industry Association Commercial Builders Council - former Chairman;  
City of Fort Myers Building and Zoning Oversight Committee - Member;  
Lee County Building Industry Association - former Board Member

**Curtis Rimes**  
GATES Construction

**Construction Manager**  
Senior Superintendent



Curtis Rimes is a highly qualified Senior superintendent with 35 years of experience. Curtis' impeccable sense of accuracy and timeliness, in addition to his attention to detail and safety requirements have proven to be superior assets in accomplishing professional results in each of his projects. Curtis plays a key role in the pre-construction phase, identifying obstacles and offering creative solutions. As Sr. Superintendent, he is responsible for the supervision of all subcontractors in the completion and compliance of their scope of works while insuring that all safety rules are followed. He is responsible for the scheduling of all trades and vendors and the review of shop drawings and submittals for compliance with project drawings and specifications. He is also responsible for quality control, project close out and transition planning.

**Select Experience**

- Ave Maria Town Center - (6) 3-story, 70 Unit Condominiums with Retail, Pool, and Parking - Ave Maria, FL
- Flamingo Resort 32-Story High Rise with Pools & Parking Garage - St. Petersburg, FL
- The Vyne House Village Center at Talis Park - Naples, FL (award-winning)
- All Seasons Naples Senior Community - Naples, FL
- MCI/WorldCom Communications Multi-Building Site - Tampa, FL
- Florida SouthWestern State College Student Services Building - Naples, FL
- Northside Medical Plaza (multiple projects) - Naples, FL

**Professional Highlights**

**Education**

U.S. Air Force | Stormwater Management Inspector | 30-Hour OSHA Certificate | CPR & First Aid Certificate

**Becky Craig**  
GATES Construction

**Construction Manager**  
Permit Expediter / Project Coordinator



Becky Craig coordinates and directs many support services that allow the field team to operate efficiently. She performs a broad range of duties: meeting organization, information and data processing, permitting, mail, printing and reproduction, records management, telecommunications management, field supplies, recycling, and disposal.

Another very important function Becky performs is expediting permits. She prepares all permit applications and is responsible for following the permit process in order to obtain approvals. She has been very successful in developing positive relationships with all the local agencies having jurisdiction by garnering their respect and trust. These positive relationships have resulted in faster permit acquisition. Becky ensures that Project Close-Out Books are accurate and assembled in an easy-to-follow format for the owner at completion of the project. She also assists with any warranty items that may arise.

**Select Experience**

- The Vyne House Village Center at Talis Park - Naples, FL (award-winning)
- Cameron Commons Retail Center - Naples, FL
- Eagle Lakes Community Center - Naples, FL
- All Seasons Naples Senior Community - Naples, FL
- Silverspot Theater at MET Square - 6 Level (17) Auditorium Theater with Lobbies, Lounge, Concessions, and Bars - Miami, FL
- Church of Jesus Christ of Latter Day Saints - Naples, FL

**Professional Highlights**

**Education**

Quickbooks and Microsoft Excel Training | Permit Seminars  
Quarterly Tax Training | Florida Public Notary

**David Tropf**  
GATES Construction

**Construction Manager**  
Senior Project Manager



David Tropf’s 39 year career has focused on the construction of government, retail, healthcare facilities, resort and hospitality, education, industrial, and office projects. His project management experience includes projects ranging up to 315,000 SF and \$143 million in construction cost, including several LEED® certified and award-winning projects. David is responsible for the overall project coordination from the pre-construction stage and permitting through to owner occupancy. Pre-construction tasks include options analysis, design preparation, budget estimating, value engineering, life cycle cost analysis, and constructability analysis. During the construction phase He is responsible for coordinating the local utility designs, easements, and installation as well as change order negotiation, cost control, quality control, project close out and transition planning. He is responsible for all Owner communications and overall progress and success of the project. He also facilitates a weekly meeting with Owner, Architect and the GATES team.

**Select Experience**

- St. John the Evangelist Catholic Church Life Activity Center - Naples, FL
- Springfield Township Civic & Community Center - Springfield Township, MI
- 29 Palms MCAGCC Housing, Amphitheater, Fitness Center and Support Facilities -

Awarded Best Project in SW United States and the entire United States by The Associated General Contractors of America - 29 Palms, CA

**Professional Highlights**

**Education**

Carpenter Apprentice Trade School, Local 114, Detroit, MI | Continuing Education Courses in Estimating/Scheduling, Construction Lien Law, Effective Negotiating and Effective Leadership

**Thomas McQueary**  
GATES Construction

**Construction Manager**  
Dir. Estimating & Preconstruction



Tom McQueary provides executive management oversight and support for all GATES projects during the pre-construction and estimating phase. He oversees the estimating department in providing comprehensive estimating for material take-offs and labor estimates as well as developing subcontractor scopes and bidding criteria. He collaborates with executive staff and the project team in all preconstruction services including sequencing, design review, constructability, and life cycle analysis, value engineering, cost/budget analysis, and strategic planning all aspects of the projects. Tom’s experience includes a wide range of public and private projects within the education, retail, government, healthcare, and mixed use sectors. With a diverse background in competitive bid, design/build, and construction management projects, Tom provides significant value to each project in which he is involved.

**Select Experience**

- All Seasons Naples Senior Community - Naples, FL
- Silverspot Theater at MET Square - 6 Level (17) Auditorium Theater with Lobbies, Lounge, Concessions, and Bars - Miami, FL
- Church of Jesus Christ of Latter Day Saints - Naples, FL
- Village School of Naples High School and Gymnasium at North Naples United Methodist Church – Naples, FL
- Quail West Golf & Country Club New Wellness & Fitness Center and Clubhouse Renovation - Naples, FL

**Professional Highlights**

**Education**

BS Construction Management  
Indiana State University



## Design Architect

**DLR Group is a global integrated design** firm with nationally-known expertise in both performing arts and multi-family housing design. DLR Group will serve as the Lead Architect / Master Planner, setting the design direction for all project components and overseeing two multi-disciplinary sub-teams—for the Performing Arts Center and Arts Village components respectively—for project execution. Leveraging the firm’s deep experience and technical capabilities in performing arts design, DLR Group will also serve as MEP and Structural Engineer and Specialty Technology Designer for the Performing Arts Center.

DLR Group has a well established working relationship with SchenkelShultz Architecture (SSA) through SSA principals Ron Reitz and Dan Laggan’s previous employment with Westlake Reed Leskosky (acquired by DLR Group in 2016). DLR Group and SchenkelShultz are currently collaborating on the Players Centre for the Performing Arts in Lake Ranch, Florida.

**Performing Arts Experts.** DLR Groups experience in design for the performing arts spans nearly five decades encompassing work on more than 250 performance facilities around the country and internationally. These include: theaters of all types and configurations, concert and recital halls, music conservatories, amphitheaters, and historic theater restorations and adaptive re-use projects.

**Integrated Design, Multi-Disciplinary Practice.** We have integrated into our firm architects, engineers, and interior designers who specialize in performing arts design as well as in-house specialists in theater technical, audiovisual, lighting, acoustics, and LEED/sustainable design. DLR Group|WRL can thus consider all aspects of a project—from the aesthetics to function to energy efficiency to equipment needs—from the very beginning.

**Multi-Family Housing Specialists.** DLR Group successfully delivers high-rise, mid-rise, market rate, affordable, high-density, for sale, for rent, student, and senior housing for different types of clients, specific to their program needs. Our housing projects have received national design awards; for example, Arterra was the first residential high-rise in California to achieve LEED Silver certification.

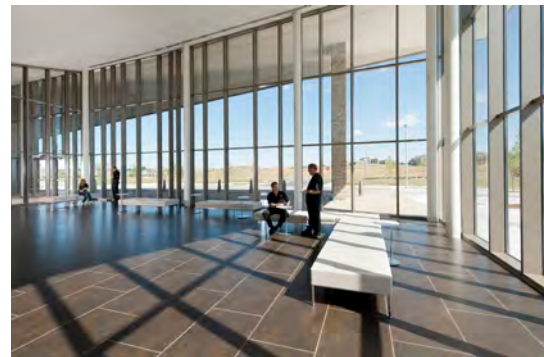
# Lone Tree Arts Center

Lone Tree, CO Owner: City of Lone Tree



The Lone Tree Arts Center (LTAC) serves as a community gathering point and premier performing arts center. DLR Group's design features an angular copper roof that serves as a beacon for the community as it juts out from the site's lower elevation and protects patrons from the elements. The exterior is constructed from brown Colorado sandstone framing a two-story glass lobby. The performance areas are intimate with every seat less than 60 feet from the stage. Windows allow natural light for performances that do not require complete "black out" conditions and for daytime maintenance and tours. Acoustics in the main stage theater are assisted by a silent air-handling system that circulates air through the space from diffusers under the seats. LTAC is also an important meeting and event rental site. A key feature of the design is the use of variable enclosures. The multipurpose room contains a movable wall that opens the space to an outdoor terrace garden that functions as an informal amphitheater.

This 43,000 SF facility is situated on 5.8 acres and includes a grand entry hall event and gallery space; a 500-seat main stage theater with orchestra and balcony seating, state-of-the-art lighting and sound systems, an orchestra pit, fly space and expertly designed acoustics; and an adaptable 225-seat multi-purpose event space that opens through a glass wall to a 350-seat outdoor terrace theater. The incorporation of efficient lighting, heating, cooling and water use systems has earned this building US Green Building Council LEED certification.



**Completion date:** 07.2011  
**Construction cost:** \$16,000,000  
**Size:** 43,000 SF

**Team Member Role(s):** DLR Group served as Lead Designer and A/E of Record for the project and provided comprehensive: architecture, interior design, MEP and structural engineering, theater technical and audiovisual design services.

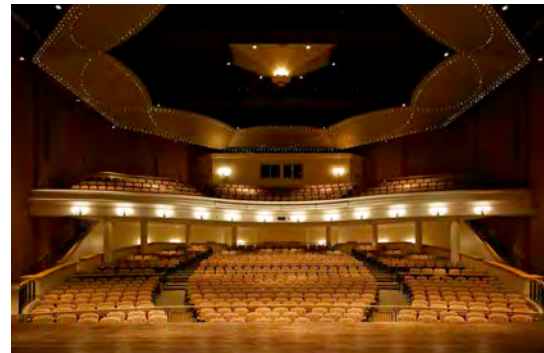
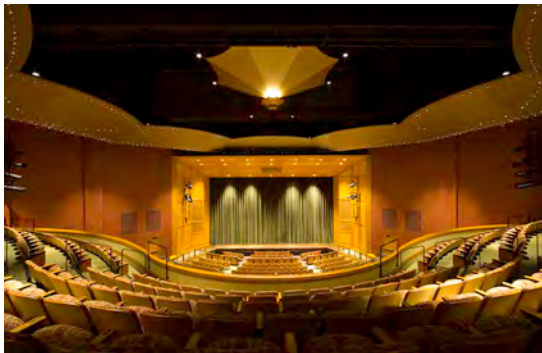
# McCoy Community Center for the Arts

New Albany, OH    Owner: New Albany Community Authority



Responding to a need for a multi-use community venue and a new high school auditorium, a number of institutions rallied together to provide the New Albany Learning Community campus with an arts center. The new facility serves as an inspirational environment to explore the arts, a place of engagement for the community, and as a venue for the Columbus Symphony. DLR Group's design reinforces the existing topography while commanding a strong architectural presence. Situated on a 4.5-acre site on the edge of a 200-acre academic campus, the building establishes a prominent presence visible from all directions. Conceived as a "village of forms," the design is carefully scaled and articulated to strengthen and preserve the traditional aesthetics of the campus.

This new 36,000 SF performing arts center was made possible through the unique public/private collaboration between the New Albany Community Foundation; The New Albany Company (real estate development company); New Albany-Plain Local School District; and the township and village of New Albany. The main 786-seat proscenium theater features a horseshoe-shaped seating configuration, curvilinear balcony, forestage reflector and orchestra shell towers integrated into proscenium, and acoustic banners. The building also includes a partial fly loft; a 100-seat, black box rehearsal studio; dance studio; scene shop; a second, student-accessible entrance; and classrooms.



**Completion date:** 01.2008  
**Construction cost:** \$14,158,743  
**Size:** 36,000 SF

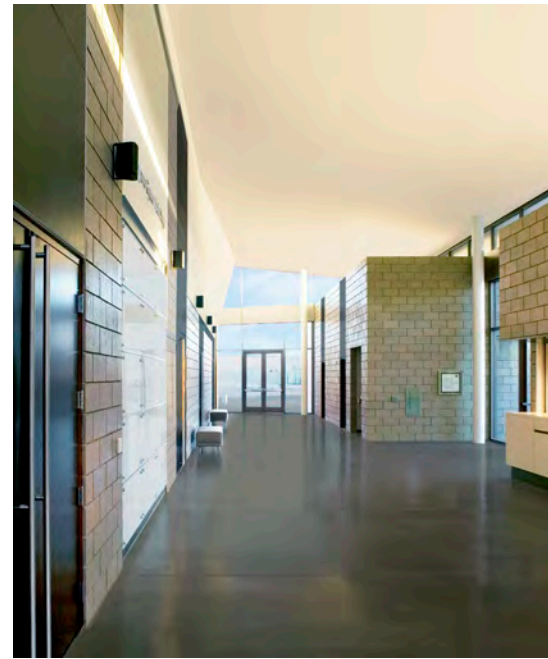
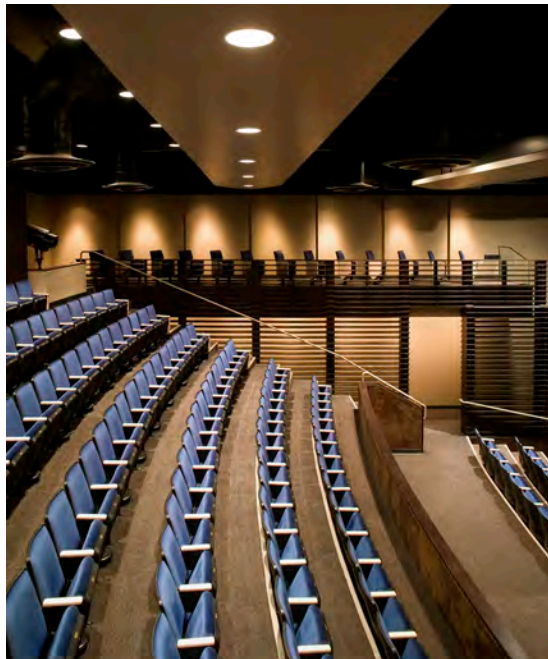
**Team Member Role(s):** DLR Group provided architecture, interior design, MEP and structural engineering, land theater technical design services.

# Peoria Center for the Performing Arts

Peoria, AZ    Owner: City of Peoria



DLR Group's design creates a vibrant and flexible, multi-functional performing arts and community center situated on a prominent and accessible site in the context of a public park and pedestrian street. The theater and lobby open to garden settings as a community amenity and downtown "living room." A palette of forms, materials, textures, and colors draws inspiration from the southwest desert/mountain context. The striking roof structure--an organic, sculptural expression evoking silhouettes of distant mountains--consists of a series of folded plates of copper shingle that visually reduces the large scale of the stage house. The roof overhangs the building envelope providing shade for public spaces and the glass lobby façade, which gives visual access to activity within. The primary user is the preeminent community theater group, Theatre Works.



The new 21,000 SF venue includes two multi-functional stages. A 250-seat main stage theater has flexible seating for varying audiences and an orchestra pit for up to 17 musicians. Other components include an 80-seat black box, art gallery/lobby, two large classrooms/workshop, dressing rooms, and offices. The project included integrated state-of-the-art theater technology and staging systems, including computerized dimming and stage lighting control systems and a variable-speed, motorized stage rigging system that is operable by one person rather than multiple people and is safer to operate than typical counterweight rigging systems.

**Completion date:** 02.2007  
**Construction cost:** \$10,956,351  
**Size:** 21,000 SF

**Team Member Role(s):** DLR Group provided architecture, mechanical and electrical engineering, interior design, and theater technical services.



# Phoenix Symphony Hall

Phoenix, AZ Owner: City of Phoenix



As part of the continuing development of the cultural, civic, and convention center in the city's core, the City of Phoenix sought to modernize the aging Phoenix Symphony Hall, home of The Phoenix Symphony, Ballet Arizona, and Arizona Opera. DLR Group's design transforms the 1972 building into a world-class, 2,387-seat performing arts venue that meets the artistic and functional demands of its sophisticated 21st century audience and civic community. Selected finishes and design elements express the same design vocabulary and defining character as the existing concrete, Brutalist-style building. The result is a vibrant destination for Phoenix and a dramatically heightened experience for performers, audiences, and visitors.

The renovation involved a new grand entrance and expanded lobby, a reworked orchestra pit, dressing room, and restroom upgrades, seating upgrades, new finishes, a new box office, a new service bar, refurbishment of existing concessions, and a new roof. The project also encompassed a number of ADA-compliant provisions, including new audience seating configuration to enhance ease of access, a new wheelchair seating section, and new elevators in the lobby. Upgrades to the HVAC, fire protection, security, and electrical systems maximize performance and were coordinated with the acoustician to meet criteria for acoustic quality. The voter-approved project, funded through the City of Phoenix Cultural Bond Program, was undertaken by the City in conjunction with the expansion and renovation of the Phoenix Convention Center, designed by HOK Venue in association with Leo A. Daly.

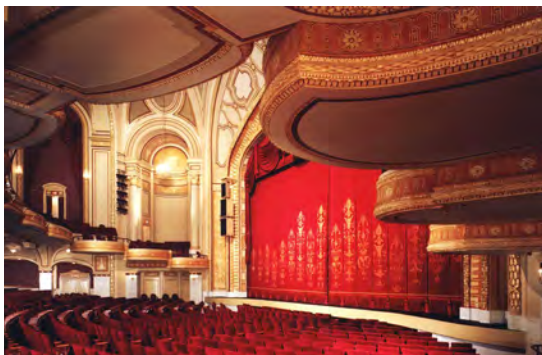


**Completion date:** 09.2005  
**Construction cost:** \$18,500,000  
**Size:** 90,000 SF

**Team Member Role(s):** DLR Group provided architecture; interior design; MEP engineering, theater technical, and lighting design services.

# Playhouse Square

Cleveland, OH | Owner: Playhouse Square Foundation



In the 1970's, DLR Group orchestrated a master plan for a 60-acre theater district in downtown Cleveland that has been fully executed and is now a major visitor attraction and economic development catalyst for the city. The first and largest renovated Theatre District in the United States and the nation's 2nd largest performing arts center, Playhouse Square now attracts over 2,000,000 patrons annually to a wide variety of arts and entertainment events. The original redevelopment of Playhouse Square received a National Trust for Historic Preservation Honor Award upon its completion. In 2010, the complex received a 25-Year Award from AIA Ohio, testifying to its ongoing success.

Our firm has been continuously involved in the development of Playhouse Square for the past 40 years. In addition to the initial restoration, renovation and reopening of Playhouse Square's magnificent 1920s theaters: the Palace, State, and Ohio, our firm designed restaurant and banquet facilities, a parking structure, a central box office and—most recently—Idea Center, the renovation of the Hanna Theatre, and the re-configuration of the Allen Theatre for use by the Cleveland Play House and Cleveland State University. Additional projects in the Playhouse Square District include an Art Gallery for Cleveland State University and the fit out of the Kent State University Cleveland Urban Design Collaborative. DLR Group completed a new 30-year master plan in 2014 and the re-creation of the Ohio Theatre's historic lobby in 2016.

**Completion date:** 1980s: Palace, Ohio, and State Theatres | 2005: Idea Center | 2008: Hanna Theatre | 2012: Allen Theatre | 2014: updated master plan | 2016: Ohio Theatre Lobby  
**Construction cost:** \$147,000,000 (in aggregate)  
**Size:** 375,000 SF (in aggregate)

**Team Member Role(s):** DLR Group provided master planning, architecture, interior design, MEP + structural engineering, LEED/ sustainable design, theater technical, historic preservation, tax credit, audiovisual, acoustics, and signage/wayfinding design services.

# Players Centre for Performing Arts

Lakewood Ranch, FL Owner: Sarasota Players



The new Players Centre for Performing Arts continues and extends the mission of the Sarasota Players to deliver quality productions of classic Broadway revival shows, intimate black box performances, and community educational programming. DLR Group's design provides a highly-flexible space that meets the Players' functional programming needs while optimizing adjacencies for multiple space configurations to meet the widest possible range of activities and performances. Unobtrusive, operable walls and integrated technical systems allow the black box, cabaret theater and main lobby spaces to be used as separate spaces or to be combined and opened to the outdoors to suit a variety of programming and performance options. The architectural design enhances the qualities of the space as a container or a backdrop for the performances within and outside of the facility. A carefully-selected materials palette that emphasizes vernacular, local building materials and common construction techniques employed in unique, expressive ways reinforces the function of the new building as a center for the arts.

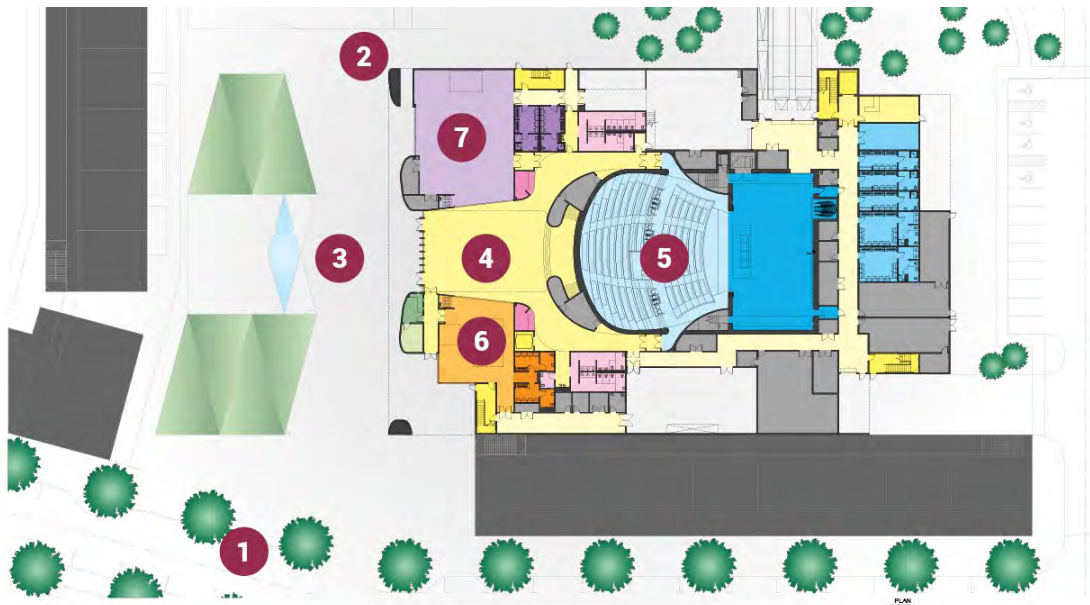
Located on a five-acre site within a new, mixed-use development in Lakewood Ranch, the 70,000 GSF building features a 480-seat main stage, a 100-seat cabaret theater, a 125-seat black box, back of house support spaces, a founder's lounge/VIP suite, education space featuring two dance studios, one rehearsal studio, and one vocal/acting studio, and office spaces adjacent to an outdoor event plaza.

**Completion date:** 07.2018 anticipated

**Construction cost:** \$27 - 30 million, contingent on construction phasing

**Size:** 70,000 GSF

**Team Member Role(s):** Working as part of an integrated team with architect of record SchenkelShultz, DLR Group is providing design and construction phase services for architecture, MEP and structural engineering, audiovisual design, theater technical, acoustics, and low voltage / IT / security design.



# David A. Straz Center for the Performing Arts Master Plan

Tampa, FL Owner: David A. Straz Center for the Performing Arts



Commanding a prominent site along the Hillsborough River, the David A. Straz Center for the Performing Arts is the sixth largest performing arts center in the U.S. Built in 1987 on an abandoned gravel lot in a city lacking cultural offerings, it is now home to Opera Tampa, the Patel Conservatory, six theaters/rehearsal halls, dining, and special event catering. Having worked with the Straz Center on previous studies and master planning efforts since 2006, DLR Group's most recent master plan addresses the Center's desire to remain a state-of-the-art performance facility that keeps pace with the city's far-reaching growth potential. The master plan merges both public and patron amenities, bringing the unintended user into contact with the arts and reciprocally delivering the arts to the riverfront.

The Straz Center master plan developed a 20-year vision for improvements and expansion involving both interior and exterior enhancements. The plan resolved key challenges: pedestrian and vehicular circulation (drop off, parking, bus staging); connection to river and downtown core; and creating and developing a new parcel on adjacent land to accommodate parking and mixed-use development. In order to reinforce the experience of the Straz Center as an arts campus, the plan recommended a series of interventions in new construction—lobby expansion, updated food and beverage services, a new event center, arrival plaza, and outdoor event terraces. It further leveraged the development of a new residential tower, the city's Riverwalk, and new Art Museum and Children's Museum located within the larger riverfront park.



**Completion date:** 01.2016

**Construction cost:** \$93,400,000 (order of magnitude estimate)

**Size:** 240,000 SF | 10 acres under consideration

**Team Member Role(s):** DLR Group provided: architecture, master planning, and urban design (in collaboration with Hargreaves and Associates) services.

# Terminal One

1500 Dornan Drive, Point Richmond, CA | Developer: Laconia Development LLC



Terminal One is a large project; the site consists of approximately 13 acres of land in the city of Richmond. The project consists of residential units, commercial spaces, and parking access. DLR Group|Kwan Henmi's design offers unparalleled waterfront living, new retail, and dining on the San Francisco Bay shoreline. Multi-level residential units will total 250 to 300 units, and nearly all will have views toward the Bay and well landscaped interstitial space to connect residents to nature. Parking is below grade and out of sight from the landscape; total capacity is 800. A 18-store tower will act as a landmark identifying the shoreline of the City of Richmond and the Richmond Yacht Club. Mid-rise and low-rise houses and condominiums fill the remaining residential need. The mixed-use development also includes 30 to 50 commercial retail spaces to serve the community and visitors to the shoreline park. The park will include walking paths, bike lanes, piers, boat docks, landscaped gardens, and open park space.

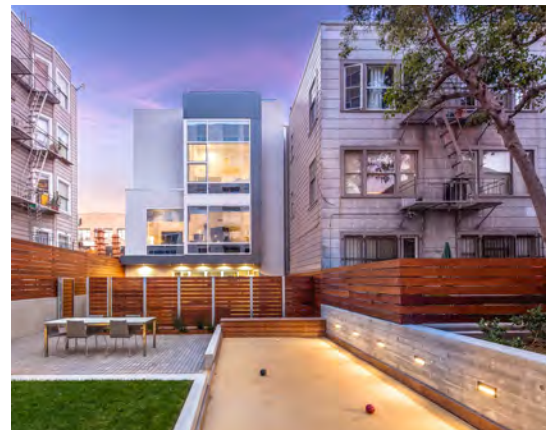
Totally building area will be approximately 600,000 SF and parking adds an additional 300,000 SF. The project will be completed in three phases, and the challenge will be managing a project of such large scale. The goal is to create a new waterfront community for residents of the city of Richmond. The development marks a change in use for the site that was formally used for industrial uses. The development will be a model of sustainable development in the areas of energy and water conservation, storm water management, and use of sustainable building materials.

**Completion date:** TBD  
**Construction cost:** TBD  
**Total square feet:** 725,000 SF  
**Contractor:** TBD  
**# of floors:** 2 to 5  
**# of units:** 334

DLR Group|Kwan Henmi provided architectural services and schematic design.

# Marlow

1800 Van Ness Ave., San Francisco, CA 94109 | Developer: Oyster Development



Coming out of the Great Recession and into Summer 2010, Oyster Development Corporation acquired a plot of land on San Francisco's busy Van Ness Avenue. This would be the first condominium land sale in roughly two years and, bucking the trend, a development planned outside the burgeoning, up-and-coming South of Market area. Marlow sits at the intersection of three established neighborhoods and was built to accommodate the changing needs of the city's residents. DLR Group|Kwan Henmi's design embraces a unitized vocabulary that gives each unit a distinct identity. The façade presents a collection of units rather than a planar array of windows. These "boxed windows" are paired with recesses that accommodate a deck for each unit and the entire assembly is woven together by vertical elements connecting the building's mid-section to its base. The unitized vocabulary is eroded at the upper levels to reduce the apparent mass of the building and to give it a distinct apogee.

Marlow is an eight-story, multi-family development, one of the first after a recession that virtually shut down all new residential projects in San Francisco. The project consists of 98 units in 2 buildings—one 8-story building with 1- and 2-bedroom units and one 4-story building with 3 townhouses—that enclose a large courtyard. It is a high density, low energy consumption structure with a Walk Score of 98, proximity to multiple transit lines, and roughly 5,000 SF of retail space. Fifteen units within the project are subsidized under San Francisco's Below Market Rate Ownership Program, which helps to provide affordable housing for lower- or middle-income households.

**Awards:** Gold Nugget Award of Merit: Best Multifamily Housing (2015) Presented by: Pacific Coast Builder Conference (PCBC); Architecture Merit Award (2015) Presented by: AIA SF

**Completion date:** 2014  
**Construction cost:** \$38M  
**Total square feet:** 162,000 SF  
**Contractor:** Build Group  
**# of floors:** 8  
**# of units:** 98

DLR Group|Kwan Henmi provided architecture, design, and construction administration services.

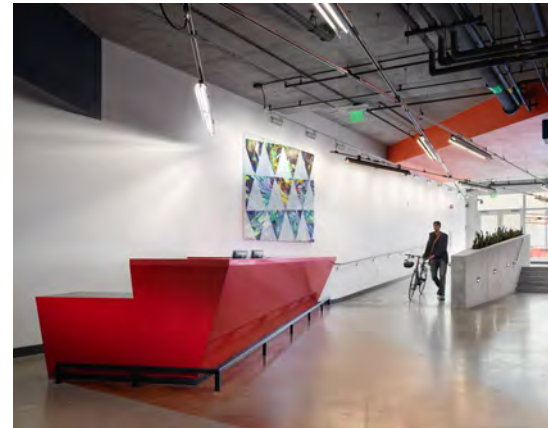
# Vida

45 Bartlett St., San Francisco, CA 94110 | Developer: Oyster Development



Far before Vida was planned, the Mission district was deeply embroiled in regional tensions regarding demographic change. Especially in the Mission, demand for housing is high, availability of housing is low, and models for culturally-sensitive development are few and far between. DLR Group|Kwan Henmi's design draws from the historic marquee of the adjacent New Mission Theater as a welcoming gesture and to create a sense of place, playing off the marquee's strong architectural element. Replacing a big-box retail store and a parking lot, the new building contributes to the vibrant streetscape with its colorful and dynamic façade. Vida's innovation comes from its engagement with, and enhancement of, the urban fabric. It is a model of how housing in San Francisco might be designed to meet ongoing demand.

Vida is an eight-story, 144-unit condominium with commercial space built into the ground floor. DLR Group|Kwan Henmi worked with Oyster to engage the community in discussions regarding the project early and frequently, producing a design that contributes through more than aesthetics. This includes land dedicated to triple the number of affordable units within the project, \$1 million to renovate the New Mission Theater—which at one point was to be demolished, to much local protest—and 0.25 percent of each unit's sales to a community fund. Parking is located entirely underground to reduce visibility.



**Awards:** Winner—Real Estate Deals 2015 Market-Rate Residential Development (2015) *Presented by:* San Francisco Business Times; Best Architectural Design of an Attached Community URBAN—Silver Award 2015 *Presented by:* National Association of Home Builder

**Completion date:** 2015  
**Construction cost:** \$32M  
**Total square feet:** 140,000 SF  
**Contractor:** Build Group  
**# of floors:** 8  
**# of units:** 114

DLR Group|Kwan Henmi provided architecture, design, and construction administration services.

# Cielo

800 Seneca St., Seattle, WA | Developer: Laconia Development



DLR Group|Kwan Henmi's design for Cielo is a response to the patchwork of material, color, and proportion endemic to First Hill in Seattle. With its splayed surfaces, the building's character presents differently from each vantage, allowing for varied response to its context. At the base of the building, the design matches the scale of nearby structures and uses transitional heights to reflect the sloping street front. The use of narrow, horizontal terra cotta panels as exterior cladding help to further subdivide the scale of the building at street level for an appropriately-scaled pedestrian experience. Ground-level landscape includes a sculpture plaza and promenade, providing a much-needed connection between Seneca Street and Jim Ellis Freeway Park. The building's plaza is a publicly accessible open space, the skewed angles of the concrete planters mimicking that of the tower looming over them and complementing the zig-zag paths of the existing elevated parkway.

Cielo is a 427,000-SF, 32-story, 335-unit high-rise apartment building located in Seattle's First Hill neighborhood. On the ground floor lobby, visitors and residents are greeted by cloud-like light fixtures that hover fore of the vertical wood slat gateway framing the building's core. The 31st floor presents a stunning view of Downtown Seattle. Residents are provided a voluminous exercise facility, generous lounge, fully featured kitchen, and outdoor grills. Ground-floor amenities include a game room, yoga room, pet spa, and park. There are five levels of subgrade parking, and the garage is accessed on a side avenue, out of the way of the busy intersection along Seneca Street.



**Awards recognition:** 2nd Place—Highrise Category for 2015 Peoples' Choice Urban Design Award (2015) *Presented by:* City of Seattle Design Review  
**Completion date:** 2015  
**Construction cost:** \$73M  
**Total square feet:** 427,000 SF  
**Contractor:** PCL Construction  
**# of floors:** 32  
**# of units:** 335

DLR Group|Kwan Henmi provided architecture, design, and construction administration services.



# India & Beech

1468 India St., San Diego, CA | Developer: Forge Land Company LLC



India Street in San Diego is the main drag in modern Little Italy. Once a neighborhood in decline, Little Italy is now littered with mid- and high-rise mixed-use buildings. DLR Group|Kwan Henmi's design is an ecologically-friendly building that showcases the latest in what a mixed-use residential-commercial tower can be. The glazed, upper, residential portion of the tower is reduced in scale through shifts in volume and angular variation in the glass. Balconies on these shifted volumes accentuate the movement of the façade, provide verticality, and allow unique expressions from each vantage point. The residential levels hover above a third-floor indoor/outdoor amenity space that includes a pool and bar/lounge. The deck sits above a large-scale art installation that conceals a mechanized parking system. The art installation, envisioned as a perforated metal expression of the local fishing industry, will be designed by artist Frank Asaro, one of the current landowners and a "son of Little Italy."

India and Beech is a 144-unit, 28-level, 162,904-SF high rise in Little Italy in downtown San Diego with 360-degree views. Modern, green technologies include greywater recycling, photovoltaics, and fuel cells. This state-of-the-art green technology will reduce energy and water costs to the point that the building will be a net exporter of energy. Utilities will be stored housed below grade and mechanical equipment will be on the roof. A fully-automated parking system, the largest of its scale on the West Coast, will maximize use of the space above the ground-floor retail and third-floor amenity areas.

**Completion date:** On-going  
**Construction cost:** TBD  
**Total square feet:** 162,904 SF  
**Contractor:** TBD  
**# of floors:** 28  
**# of units:** 144

DLR Group|Kwan Henmi provided architecture, design, and construction administration services.

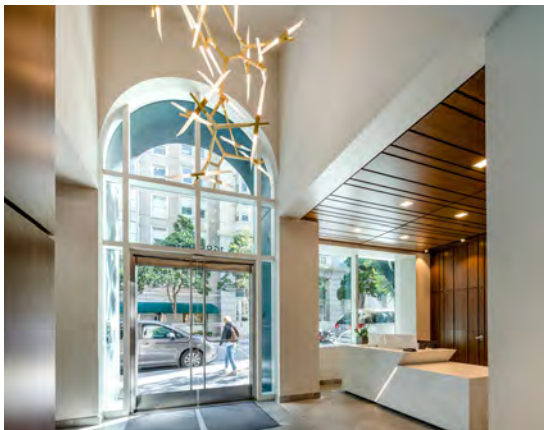
# The Rockwell

1688 Pine St., San Francisco, CA | Developer: Oyster Development



The corner at Pine and Franklin was formerly littered with abandoned historic buildings, a holdover from the days when the area was known as Auto Row. DLR Group|Kwan Henmi's design for the condominium that now occupies the corner weaves two towers into the chiseled façades of a commercial garage and small auto showroom. The building's main entrance, solarium, and courtyard are accessed through their original portals, evoking a sense of wonder and tying residents to the neighborhood's storied past. Above street-level sits a modern design that, in a single structure, captures a century of advancement. High-end fixtures and finishes complete the developer's vision of a project that simultaneously reflects and contributes to the community.

With over 440,000 SF, Rockwell features 259 residential units, a solarium, 4,000 SF of retail space, and a well-appointed owner's club with kitchen, media room, fitness center, and enclosed courtyard. DLR Group|Kwan Henmi worked with preservationists to restore the historic Auto Row façades to their early-20th century state, giving residents and passersby alike a glimpse of the neighborhood as it once stood. Below-grade parking is outfitted with automated car stackers and electric car charging stations.



**Awards:** Gold Nugget Grand Award: Best Multifamily Housing Community—100 du/acre or more (2017) *Presented by:* Pacific Coast Builder Conference (PCBC); Gold Nugget Award of Merit: Residential Housing Project of the Year—Attached Product (2017) *Presented by:* Pacific Coast Builder Conference (PCBC); Best Architectural Design of an Attached Community—Silver Award (2016) *Presented by:* National Association of Home Builders

**Completion date:** 2016  
**Construction cost:** \$76M  
**Total square feet:** 440,000  
**Contractor:** Build Group  
**# of floors:** 12  
**# of units:** 260

DLR Group|Kwan Henmi provided architecture, design, and construction administration services.

# Gateway Tower

470 S. Market St., San Jose, CA | Developer: The Core Companies



A major retail district in the 1800s, SoFA (South of First Area) gradually evolved into the arts and entertainment destination for which it is now known. The changing demographics have made the neighborhood one of the most attractive to young, first-time homebuyers. DLR Group|Kwan Henmi's design will introduce a new typology while paying homage to the context that enables it. The residential / commercial development will provide high-end housing above modern, street-level retail. Two historic storefronts will be restored and integrated into the design, preserving an element of the existing, street-level experience. Compartmentalization below—aided by the historic facades—and the texture above tie the various elements of the design to the scale of the existing buildings; Gateway Tower itself is far larger, in line with the recent and planned developments in the area. While the intended resident is tech oriented, the project will reflect the the arts-oriented community that revitalized SoFA in that latter part of the 20th century.

Gateway Tower is a planned 390,000-SF, 25-story, mixed-use luxury high-rise in the heart of Silicon Valley. With a key location near downtown San Jose and the San Jose Convention Center, residents will be close to various high-profile companies. Notably, the new Apple Campus is under construction just a few miles away. Additionally, SoFA and downtown San Jose feature many options for dining, entertainment, and shopping that appeal to those seeking a modern urban experience.

**Completion date:** On-going  
**Construction cost:** \$124M  
**Total square feet:** 390,00 SF  
**Contractor:** TBD  
**# of floors:** 25  
**# of units:** 308

DLR Group|Kwan Henmi is and will be providing architecture, design, and construction administration services.



### About Tom

From intimate community theaters to massive amphitheaters, Tom has played an integral role in some of the most impressive performing arts venues across the globe. He is a sought-after cultural and performing arts thought leader who actively seeks to re-imagine the patron's experience, creating spaces that are exciting and engaging. From sweeping architectural forms, to expert lighting and acoustics, the firm's integrated design approach has elevated theater design and has set new industry standards.

Tom's business acumen and design expertise have helped secure a number of prestigious cultural and performing arts projects. He continues to be instrumental in the firm's partnership with Nederlander Worldwide, initiating a number of projects across Asia. He has cultivated business relationships resulting in projects from Gabon, Africa to Doha Qatar in the Persian Gulf.



### Select Experience

**Players Centre for the Performing Arts; Lake Ranch, FL**

Designed in collaboration with Schenkel Shultz, this new performing arts center within mixed-used development features 480-seat main theater, 100-seat cabaret theater, 125-seat black box.

**Onondaga Lakeview Amphitheater; Geddes, NY**

New \$49.5 million county-owned outdoor performance and event complex. The lakeside amphitheater has seating capacity of 5,000 under cover and 12,500 on the lawn.

**2,000-seat Theater; Shanghai, China**

New Broadway-style venue in planned new multi-venue theater district

**ArtsBlock; Wausau, WI**

**Clemens Center; Elmira, NY**

**Germantown Performing Arts Centre; Germantown, TN**

**Joplin Arts and Entertainment Center; Joplin, MO**

**Strand Capitol Performing Arts Center; York, PA**

**China Tanglewood; Beijing, China**

**Taiwan Land Development Corporation with Nederlander Worldwide**

500-Seat Theater, Hualien, Taiwan

Hakka Art and Performance Centre Master Plan, Hualien, Taiwan

Hualien-Hakka Grand Theater, Hualien, Taiwan

**Palais des Arts; Libreville, Gabon, Africa**

**CitiFi LLC, Lusail City Cultural District, Master Plan; Doha, Qatar**



### Professional Highlights

#### Education

Bachelor of Architecture,  
Virginia Polytechnic Institute and State University

#### Registration & Licensing

Registered Architect: NY, MO

#### Professional Affiliations

American Institute of Architects

*“Embracing technological advances and innovative design concepts has kept us at the forefront of breakthroughs in elevating audience experiences.”*



### About Laura

Laura has designed and managed a variety of projects throughout her career, from the programmatic stages of design through budgeting and construction administration. She brings specialized expertise in residential and mixed-use projects. Her experience also includes design of religious, educational, transit, and healthcare facilities. Laura is a passionate advocate for environmental stewardship. As a LEED accredited professional, Laura is a champion for sustainable design in the firm and assists project teams in integrating sustainable solutions on projects throughout California. She is dedicated to independently researching environmental issues, and takes great pride in applying this to her designs. Laura's strong organizational and interpersonal skills make her a stellar leader of project teams and coordinator with consultants and clients.

### Select Experience



#### Parkmerced Block 20; San Francisco, CA

Project Manager of a 435,000 SF 269-unit residential complex that includes an 8-story midrise and a 17-story tower containing studios, one-bedroom units, 2-bedroom units, 3-bedroom townhouses, 2 residential lobbies, fitness, and other amenity spaces. Slated to start construction early 2017.

#### 600 Wall Street; Seattle, WA

Project Architect of a new high-rise multifamily development, rising approximately 400 feet on the parcel bounded by 6th Ave., Wall St., and Denny Way in the Danny Triangle Urban Village. This area is undergoing intense redevelopment, as the new Amazon headquarters will be located only two blocks away. The project will consist of 43 stories with 400 above-grade residential units and five floors of parking. Also included will be 1,800 SF of commercial space and two floors of amenities, including a unique rooftop with multiple levels.

#### Nema - 8 10th street; San Francisco, CA

Assistant Project Manager, LEED Consultant, and Project Architect of the \$172 million 950,900 SF 754-unit rental residential community that includes 4 towers unified at the base with a podium and 2 basement levels. The 9-, 12-, 22-, and 35-story towers contain studios, one-bedroom units, 2-bedroom units, two residential lobbies, retail, amenity space, and a Boomerang Robotic Valet parking system.

#### Princess Ka'iulani Development; Honolulu, HI

Project team, 1.4 million sf multi-building hotel, residential and retail development with a new 35-story condo-hotel (152 condo units, 300-rooms), renovation of existing 28-story hotel tower (660 rooms), a new 4-story podium containing 80,000 SF retail, amenity space and pool deck, and a parking garage with pool deck, restaurant, and ballroom.

\* Work completed with prior firm



### Professional Highlights

#### Education

Master of Architecture with Honor  
Washington University, St. Louis, MO

Bachelor of Arts in Architecture, Magna Cum Laude  
Clemson University, Clemson, SC

#### Registration & Licensing

Architect, State of Maryland  
Registration No. 13891

LEED Accredited Professional BD+C, USGBC

#### Professional Affiliations

Member, American Institute of Architects

Member, U.S. Green Building Council

Member, SPUR

Member, San Francisco Housing Action Coalition

*“ Because buildings are interruptions to the natural world, I’m always excited to be leading in environmental stewardship. People should work with the environment - not against it. ”*

## Noah Steffes

RA, LEED AP - Sr. Associate DLR Group

## Design Architect

Project Manager



### About Noah

Noah has nearly a decade of professional experience in architecture ranging in scope and scale from single-family residential to large-scale cultural arts and master-planning projects. He has served in multiple project roles including design, construction documentation, and construction phase services, as well as quality control/quality assurance and the production of presentation materials and graphics. Noah's previous work experience includes work on multi-family residential and core-and-shell office buildings.

### Select Experience

Players Centre for the Performing Arts; Lake Ranch, FL  
Onondaga Lakeview Amphitheater; Geddes, NY  
2,000-seat Theater; Shanghai, China  
Our Lady of Good Counsel High School Performing Arts Center; Olney, MD  
Joplin Arts and Entertainment Center; Joplin, MO  
Palais des Arts; Libreville, Gabon, Africa  
Performing Arts Center Study; Rochester, NY  
Smithsonian American Art Museum's Renwick Gallery; Washington DC  
Square 54, Phase 3 Residential, Washington DC\*  
Moda Vista Condominiums Public-Use Space Study, Silver Spring, MD\*  
Park East Condominiums, Washington DC\*

\* Work completed with prior firm

### Professional Highlights

#### Education

Master of Architecture, The University of Michigan  
Bachelor of Science in Architecture, Lawrence  
Technological University

#### Registration & Licensing

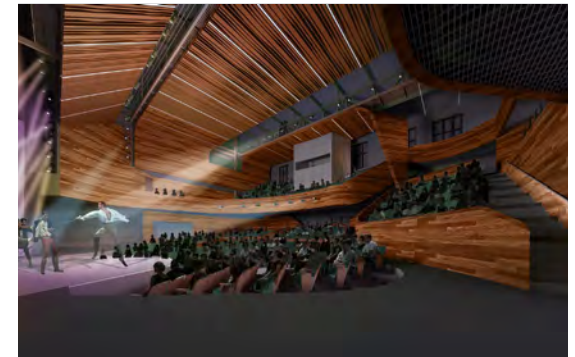
Registered Architect: DC  
LEED accredited professional  
Green Globe Professional

## Jason Majerus

PE, LEED AP BD+C, Principal, DLR Group

## PAC Engineers

Lead Mechanical Engineer - PAC



### About Jason

Jason has served as lead mechanical engineer / project manager on an array of complex projects. His experience includes cultural & performing arts, healthcare, public, data centers, workplace, higher education, K-12, and industrial projects. He oversees project development, energy analysis, design engineering, specifications, construction administration, and commissioning. He has a wealth of experience in HVAC, plumbing, and fire protection system design for both new construction and renovation with a focus in energy efficient system design, sustainability, central plant optimization and indoor air quality. He has been an active member of ASHRAE since 2001 and served previously on the Board of Directors for the Northwest Florida Chapter.

### Select Experience

Michael D. Eisner Performing Arts Center; Granville, OH  
Point Park University, Pittsburgh Playhouse; Pittsburgh, PA  
Slippery Rock University, Performing Arts Center, Slippery Rock, PA (QC)  
NorShor Theater, Duluth, Minnesota  
Playhouse Square, Ohio Theatre, Lobby Renovation; Cleveland, OH  
Carolina Theatre/Belk Place; Charlotte, NC  
Oberlin College Baker Nord Performing Arts Annex; Oberlin, OH  
Murphy Arts District; El Dorado, AR

### Professional Highlights

#### Education

Bachelor of Science, Syracuse University

#### Registration & Licensing

Professional Engineer: FL, AL, AR, GA, MS,  
OH | Certified Energy Manager (CEM);  
Certified Commissioning Authority (CxA)

**Jonathan Hopkins**  
Senior Associate - DLR Group

**PAC Technology**  
Acoustician



**About Jonathan**

Jonathan specializes in architectural acoustic design for performing arts venues, including: multi- and single-purpose theaters, concert halls, film theaters, music performance spaces, music schools, and other entertainment venues. As an engineer and musician, he has a unique perspective on acoustic design, architectural acoustics, vibration and mechanical noise control, sound isolation, and environmental noise. Jonathan is a lifelong musician and music fan; he has studied piano, vocal, and saxophone performance from a young age as well as music theory, ear training, music history, and the recording arts.

**Select Experience**

Players Centre for the Performing Arts; Lake Ranch, FL  
Carolina Theatre Renovation; Charlotte, NC  
Murphy Arts District; El Dorado, AR  
2000-Seat Theater; Shanghai, China  
Sacramento Community Center Theater; Sacramento, CA  
University of Nevada Reno, Music and Fine Arts Addition; Reno, NV  
Santa Fe College Performing Arts Center; Gainesville, FL\*  
Florida Gulf Coast Univ. Performing Arts Center; Fort Myers, FL\*  
The Han Show Theater; Wuhan, China\*  
Wallis Annenberg Center for the Performing Arts; Beverly Hills, CA\*

\* Work completed with prior firm

**Professional Highlights**

**Education**

B.S. Engineering, Acoustics, Music, University of Hartford | Masters Coursework, Penn State University

**Certifications**

NAVLAP Cert. for ASTM E-336 (NIC) +  
ASTM E-1007 (FIIC) field measurements

**Wes Calkin**  
DLR Group

**PAC Technology**  
Theater Design Specialist



**About Wes**

Wes Calkin is an experienced theater design specialist with broad experience in theatrical systems and equipment, including stage lighting, stage rigging, networked lighting controls, motorized lifts, modular platforming, and seating. He has worked as a lighting and scenic designer on theatrical productions across the country providing him an intimate understanding of working theaters and offers him invaluable insight into clients' needs. His appreciation of the history of theater systems and equipment –from common elements like counterweight rigging dating back to the 1500s to color-mixing LED lighting – gives him perspective on the changing needs and technologies of today's theaters and theaters in the future.

**Select Experience**

Players Centre for the Performing Arts; Lake Ranch, FL  
Denison University, Michael D. Eisner Performing Arts Center; Granville, OH  
Chesterfield Community Arts Center; Chester, VA  
Carolina Theatre Renovation; Charlotte, NC  
Hamilton County Memorial Hall Renovation; Cincinnati, OH  
Murphy Arts District; El Dorado, AR  
2,000-seat Theater; Shanghai, China  
Point Park University, Pittsburgh Playhouse; Pittsburgh, PA  
University of Nevada Reno, Music and Fine Arts Addition; Reno, NV

**Professional Highlights**

**Education**

MFA Lighting Design & Technology, University of Cincinnati | BA Theater, Wake Forest University



LeeSar Regional Service Center completed by SchenkelShultz & GATES Construction



South Regional Library, Collier County

# SCHENKELSHULTZ

□ □ □ ARCHITECTURE □ □ □

## Local AOR - Performing Arts Center

SchenkelShultz has achieved design excellence since our inception in 1958 as a full-service architectural firm, specializing in education, aviation, municipal, and community facility design. The firm began as a two-person partnership more than 59 years ago, and has since grown to be consistently ranked as one of the top design firms in the nation, by *Engineering News Record* and *Southeast Construction*. The firm has been a part of the Southwest Florida community since 1992, with our first project in Naples completing in 1998. Since that time, we have completed more than 50 projects in the local community, including two projects with Gates Construction.

Our experience has taught us the importance of working closely with our clients to understand the specific programmatic and design needs. Additionally, we understand the complexities of collaborative design projects. SchenkelShultz is currently working alongside DRL Group on the new Players Centre Performing Arts Center in Lakewood Ranch.

Combining DRL's highly technical knowledge of theater, acoustic, and lighting design, with SchenkelShultz's local design expertise, provides you with a team that has the highest level of professional qualifications to ensure your vision of a high quality professional theater is achieved.



# Venice Performing Arts Center

Venice, FL    Owner: The School Board of Sarasota County / City of Venice



SchenkelShultz worked with the City of Venice and the School District in order to design a joint-use Performing Arts Center, located on the Venice High School campus. To benefit the needs of both the school and the city, the school auditorium was upgraded to a full-service community performance hall that is the new home for the Venice Symphony Orchestra and the Venice Concert Band. In addition to the performing arts spaces, the center will also provide space for instruction, including rooms for drama, band, chorus, orchestra and feature a piano lab. The 53,000 SF community facility includes the following performing arts components:

- Auditorium with 1,050 seats
- Full fly stage house with counterweight rigging, draperies, orchestra shell
- Motorized Orchestra Pit
- Dimmers, Audio, Video, House Speakers, etc.
- Acoustical separations and finishes



**Completion date:** 10.2014  
**Construction cost:** \$15,993,591  
**Size:** 53,000 SF

**Team Member Role(s):** SchenkelShultz served as the designer and architect of record for the project and provided comprehensive architecture and construction administration services.

# Bayshore Cultural Arts Village Master Plan

Naples, FL Owner: Pizzuti Solutions, LLC.



The new master plan for the Bayshore Cultural Arts Village was developed in conjunction with Pizzuti Companies in order to revitalize an area of Collier County to support and enhance the community's need for recreation, retail and cultural arts facilities. The focus of the master plan was centered on creating a series of pedestrian streets and paths, and a variety of public places where each has its own character and set of uses. A recreation area will connect the new village with a nearby community park with pavilions and views of the preserve. The 18-acre plan included the following spaces:

**The Artists Live / Work Village** – serves as prominent pedestrian entrance and includes a community market, retail shops, outdoor café seating, artist retail and studio spaces with above residences, and an interactive play fountain water feature.

**Public Performance and Participation Area** – a new community arts facility with a 350-seat black box theater, studios, classrooms, administration area, an outdoor amphitheater surrounding a grand lawn space, a 3-level parking garage and walking path.



**Completion date:** 12.2009

**Construction cost:** N/A

**Size:** 18-Acres

**Team Member Role(s):** SchenkelShultz served as the master planner for the project and provided design services, including 3D renderings and conceptual design.



### About Ron

Ronald E. Reitz, AIA, LEED® AP, a Principal in SchenkelShultz's Orlando office, has been a leader in the firm's design team for the past 13 years. He is passionate about designing projects that make an impact on the communities in which they serve. Ron's experience has included more than 6.1 million square-feet of projects, including performing arts centers, recreation centers, libraries, educational facilities, office buildings and parish community life centers.

He is responsible for leading the design team through the planning and initial design process, creating 3D graphic images that bring each design to life. As part of the design process, Ron works collaboratively with project stakeholders to build consensus and ensure that each stakeholder has a voice in the final design.



### Select Experience

#### Bayshore Cultural Arts Village Master Plan; Naples, FL

Provided 3 preliminary and final conceptual designs, colored elevations of perspective buildings and a preliminary floor plan for the proposed performing arts facility associated with Master Planning of the Bayshore Gateway Cultural Arts Mixed Use Development.

#### Venice Performing Arts Center; Venice, FL

New 1,050 seat performing arts center that was designed in collaboration with the School District and the City of Venice. The 51,000 SF center can be utilized for both school and community performances and events. In addition to the performance hall, the \$15.9 million facility includes rooms for drama, band, chorus, orchestra and features a piano lab.

#### Winter Park Community Center; Winter Park, FL

New 37,297 SF community center located in the heart of the city designed as a gathering space for the community. The \$5.9 million design features an open lobby and reception area, offices, meeting space, kitchen and concessions area, as well as a multi-purpose area and stage that opens to the outdoors and is used for performances year round.

#### LeeSar Regional Service Center; Fort Myers, FL

This project was completed alongside Gates Construction. A state-of-the-art, 195,000 SF distribution facility serving the needs of the Lee Memorial Health System and Sarasota Memorial Health Care system. The \$27.2 million facility is used for receiving, storing and shipping medical supplies.



### Professional Highlights

#### Education

Bachelor of Architecture, Kent State University

#### Registration & Licensing

Registered Architect, FL #92144  
LEED® Accredited Professional, USGBC

#### Professional Affiliations

American Institute of Architects



### About Dan

Daniel C. Laggan, AIA, a Partner in SchenkelShultz's Orlando office, has extensive experience completing performing arts facilities, including more than \$150 million of projects to date. As Partner-in-Charge for this project, Dan will work closely with the entire design team to ensure your needs and vision are met throughout the project. Dan is currently leading this design team, alongside DLR, for the new Players Centre for Performing Arts in Lakewood Ranch, and will utilize this recent experience for the Bayshore Gateway Triangle project.

As a Registered Architect in 23 states, Dan has worked with multi-billion dollar net worth private individuals and corporations, along with public sector clients. He understands the importance of leading a seamless and efficient design process and his experience includes more than 3 million square feet of diverse projects in the past 5 years.

### Select Experience

#### The Players Centre for Performing Arts; Lakewood Ranch, FL

This project is a collaboration between SchenkelShultz and DLR Group. The \$28 million multi-use venue includes a 480-seat main stage auditorium, 125-seat black box theatre and a 100-seat cabaret. Other areas in the 70,000 SF facility include an expanded education component and an outdoor events plaza.

#### Venice Performing Arts Center; Venice, FL

New 1,050 seat performing arts center that was designed in collaboration with the School District and the City of Venice. The 51,000 SF center can be utilized for both school and community performances and events. In addition to the performance hall, the \$15.9 million facility includes rooms for drama, band, chorus, orchestra and features a piano lab.

#### Previous Experience at Westlake Reed Leskosky (now known as DLR Group)

Bethel Woods Center for the Arts (Woodstock); Bethel, NY  
Performing Arts Foundation Arts Block; Wausau, WI  
Oberlin College Conservatory, Jazz Institute Master Plan; Oberlin, OH  
Rockford (Cornado) Theatre; Rockford, IL  
Stanley Performing Arts Theater; Utica, NY  
The Clemens Center Master Plan / Renovation; Elmira, NY  
Breen Center for Performing Arts; Cleveland, OH



### Professional Highlights

#### Education

Bachelor of Architecture, Kent State University

#### Registration & Licensing

Registered Architect, FL #AR94736  
plus an additional 22 states

#### Professional Affiliations

American Institute of Architects

**Gary F. Krueger**  
AIA - Partner, SchenkelShultz

**Architect of Record - PAC**  
Project Manager



### About Gary

Gary is a Partner with SchenkelShultz and a Registered Architect with 34 years of experience. He began his architectural career in Southwest Florida in 1992 and has since been involved in more than 200 projects in Southwest Florida and will use this local experience for the Bayshore Gateway Triangle project. Gary has a proven track record as a Project Manager having managed multi-disciplined projects ranging in construction costs of \$8,000 up to \$52 million. He will be responsible for overseeing the project management and construction effort and will maintain throughout the life of the project, he will ensure that your goals and objectives are achieved.

### Select Experience

Bayshore Arts Cultural Master Plan; Naples, FL  
Moore Haven Middle-High School Performing Arts Center; Moore Haven, FL  
Collier County South Regional Library; Naples, FL  
Gulf Coast High School with Auditorium; Naples, FL  
Palmetto Ridge High School with Auditorium; Naples, FL  
Kraft Office Center; Naples, FL  
Mason Classical Academy Renovation (with Gates Construction); Naples, FL  
LeeSar Regional Service Center (with Gates Construction); Fort Myers, FL

### Professional Highlights

#### Education

Master of Architecture, University of Oklahoma

#### Registration & Licensing

Registered Architect, FL #AR0010018

**Brook K. Sherrard**  
AIA, LEED® AP - Principal, SchenkelShultz

**Architect of Record - PAC**  
Project Architect



### About Brook

As Project Architect, Brook will work with the design team to complete document production, project documentation, construction document preparation and coordination. He served in this same capacity on the Venice Performing Arts Center project, which has a similar scope to the Bayshore Gateway Triangle project.

Additionally, Brook serves as the leader of SchenkelShultz's Revit team. He ensures that the firm understands the latest trends in building information modeling, specifically the Revit program and works to implement these tools most effectively in our design process. Brook will apply his collective expertise to ensure success on the design of your new facility.

### Select Experience

The Players Centre for Performing Arts; Lakewood Ranch, FL  
Venice Performing Arts Center; Venice, FL  
Weeki Wachee High School with Performance Auditoria; Weeki Wachee, FL  
Moore Haven Middle-High School Performing Arts Center; Moore Haven, FL  
Millennium Middle-High School Performing Arts Magnet School; Sanford, FL  
Tohopekaliga High School with Auditorium; Kissimmee, FL

### Professional Highlights

#### Education

Master of Architecture, University of South Florida

#### Registration & Licensing

Registered Architect, FL #AR92948  
LEED® Accredited Professional, USGBC



Majorca



**HUMPHREY • ROSAL**  
ARCHITECTS

## Architect of Record - Arts Village

Humphrey Rosal Architects provides a full range of services, including program analysis, conducting focus groups, master planning, building design, interior architectural design, construction documentation, construction administration, and presentation graphics and PowerPoint Programs.

Humphrey Rosal Architects has maintained a high diversity of projects, which they feel is the strength of the firm. Diversity has instilled a broad frame of reference and respect for the uniqueness of each client and project.

With excellence as a goal, Humphrey Rosal Architects strive for originality and complete solutions that work on all levels for everyone connected with them; projects that fully address budgets, timetables, context, site conditions, functions, and image, while elevating the artistry of the solution to evoke a strong positive emotional response. Putting these concepts into practice result in dramatic and exciting design statements that solve the specific concerns of the client.

Humphrey Rosal Architects has designed single and multi-family residences, commercial office and bank complexes, health care facilities, retail shopping centers, restaurants, and over the years has developed an expertise in the field of amenity and hospitality architecture. This area extends to clubhouses, fitness and aerobic centers, tennis centers, and community and activity centers. The firm recently received recognition for the "Best Clubhouse in the USA" from the National Association of Home Builders for the design of the Miromar Beach Club.

The firm is a member of the American Institute of Architects and the Collier County Builders and Contractors Association. Humphrey is a past Director of NAC-PAC, Eden Florida, Naples Botanical Garden and the YMCA. Humphrey Rosal Architects is a member of the Board of Trustees of Saint Matthews House, the Board of Directors of Naples Equestrian Challenge, and an active Boy Scout Leader.

# Multi-Family Housing Experience



Isle Verde Villas



Sandpiper Green



Colony Court



Castella

# Other Relevant Experience

## Country Club/Amenity

Bay Colony Beach Club  
 Bentley Village Country Club  
 Bentley Village Skilled Nursing Facility  
 Bonita Isles Clubhouse  
 Bonita National Clubhouse & Sports Center  
 Brooks Town Center  
     Fitness Club  
     Enrichment Center Restaurant/Lounge  
     Performance Pavilion  
 Colony Bay Club  
 Colony Golf Club & Fitness Center  
 Coral Creek Clubhouse  
 Cypress Woods Country Club  
 Eagle Creek Country Club  
 Grey Oaks Country Club  
 Renovation Grey Oaks Club  
 Café & Tennis Center  
 Gulf Harbour Golf & Country Club  
 Hammock Bay Fitness Center  
 Hammock Bay Sports Club  
 Heritage Oaks Country Club  
 Hammock Oak Park Clubhouse  
 Kelly Greens Country Club  
 Lely Players Club and Expansion  
 Lexington Country Club  
 Mediterra Sports & Enrichment Facility

Miromar Beach Club & Fitness Center  
 Miromar Golf Club  
 Miromar Blue Water Grille  
 Naples Harbour Yacht Club  
 Naples Lakes Country Club  
 Naples Yacht Club, Phases I,II & III  
 Olde Cypress Fitness Center  
 Olde Hickory Clubhouse Renovation  
 Olde Hickory Fitness Center  
 Olde Florida Golf Club  
 Pelican Bay Sandbar Renovation  
 Pelican Bay Tennis Center  
 Pelican Marsh Community & Fitness Center  
 Renaissance Country Club  
 River Hall Community and Fitness Center  
 River Hall Golf Club  
 Shadow Wood Preserve Country Club Stonebridge  
 Country Club  
 Treviso Bay Country Club  
 Treviso Bay Fitness Center & Pool Café Vanderbilt  
 Country Club, Pool Café & Sport Center  
 Wiggins Bay Club  
 Wilderness Clubhouse Expansion & Remodeling  
 Winding Cypress Amenity Campus Wyndemere  
 Country Club Addition Wyndemere Tie Breaker  
 Restaurant

## Commercial

Trianon Center Office Building  
 Promenade Shops in Bonita Bay  
 Ave Maria Town Center, Mixed Use 1, 2  
 Philharmonic Center for the Arts  
 Bank of Florida  
 TIB Bank Branches  
 Barnet Bank - Various Branches Brooks Grand  
 Plaza Retail & Office  
 Chemical Bank Branch  
 Citizens National Bank Building  
 Community Bank of Naples  
 Da Ru Ma Japanese Restaurant  
 Fifth Third Bank (5th Ave. S.)  
 First Church of the Nazarene  
 Covenant Presbyterian Church Seagate Baptist  
 Church Vanderbilt Presbyterian Church  
 Bonita Springs Presbyterian Church  
 Florida Community Bank  
 Island Bank of Marco  
 Lakeview Medical Office Building  
 La Majorca Condominiums Manufacturers  
 Hanover Bank Naples Endodontics  
 Naples Professional Properties Building  
 NBD Bank  
 Pogenpohl Office Building  
 South Bay Bistro





## David Humphrey

AIA, Principal, Humphrey Rosal Architects

## AOR - Arts Village

Principal in Charge

### About David

David moved to Florida in 1979 and became a partner in the firm of Forsythe Humphrey & Associates in 1984. In November 1987, he established the firm of David Humphrey & Associates, and in 1999 assumed a partner and established the firm which is currently known as Humphrey Rosal Architects.

Humphrey's accomplishments have earned him architectural accolades and such design awards as the international award from the International Council of Shopping Centers (Promenade Shops), Aurora Awards, Pinnacle Awards (Renaissance Clubhouse), the Grand Aurora (Miromar Beach Club; three years in a row), numerous Sand Dollar and Grand Sand Dollar awards for Humphrey Rosal's own office building.

With excellence as a goal, Humphrey Rosal Architects strive for originality and complete solutions that work on all levels for everyone connected with them: projects that fully address budgets, timetables, context, site conditions, functions, and image. Putting these concepts into practice result in exciting design statements, while solving the specific concerns of the client.

### Professional Highlights

#### Education

Master of Architecture and Environmental Design  
Kent State University  
Bachelor of Architecture  
Ohio State University

#### Registration & Licensing

American Institute of Architects  
Collier County Builders & Contractors  
Association  
Economic Development Council  
Airplane Owners & Pilots Association

## Randy Rosal

AIA, Principal, Humphrey Rosal Architects

## AOR - Arts Village

Designer / Project Architect

### About Randy

Randy has been project architect for numerous building types ranging in scale from private residences and small commercial projects to complex multi-use structures, including banks, retail stores, hotels, restaurants, offices and clubhouses.

Prior to joining the firm, Rosal worked with Ultratec Consultants, specializing in the installation of highly sophisticated audiovisual systems for projects such as the RFK Stadium in Washington D.C., The O'Connell Center and Florida Field ("The Swamp") in Gainesville, Florida.

Randy has been involved in several collegiate and professional projects that have earned recognition from the University of Florida, Kent State University, the City of Naples, the Naples Chamber of Commerce, the Southeast Builders Conference and the International Council of Shopping Centers, amongst others. He is particularly honored to have been one of Kent State's nominees to the prestigious S.O.M. Fellowship competition, an honor bestowed only to the top two architecture students of each school.

### Professional Highlights

#### Education

Bachelor of Architecture and Environmental Design  
Kent State University  
BDES in Architecture and Urban Planning  
University of Florida



We're active members of the communities we serve. That's why at Stantec, we always design with community in mind.

The Stantec community unites approximately 22,000 employees working in over 400 locations across 6 continents. We collaborate across disciplines and industries to bring buildings, energy and resource, environmental, water, and infrastructure projects to life. Our work—engineering, architecture, interior design, landscape architecture, surveying, environmental sciences, construction services, project management, and project economics, from initial project concept and planning through to design, construction, commissioning, maintenance, decommissioning, and remediation—begins at the intersection of community, creativity, and client relationships.

Since 1954, our local strength, knowledge, and relationships, coupled with our world-class expertise, have allowed us to go anywhere to meet our clients' needs in more creative and personalized ways. With a long-term commitment to the people and places we serve, Stantec has the unique ability to connect to projects on a personal level and advance the quality of life in communities across the globe. Stantec trades on the TSX and the NYSE under the symbol STN. Visit us at [stantec.com](http://stantec.com) or find us on social media.

# Naples Botanical Garden

Naples, FL | Owner: Naples Botanical Garden



Stantec's multidisciplinary approach to the design of the Naples Botanical Gardens was crucial to meet the challenges of this project. Stantec was selected to provide site engineering, environmental permitting, surveying, and construction management services for the new Naples Botanical Gardens, which was constructed on 160 acres of land 10 minutes from the heart of Naples.

The garden site itself is unique, as it contains seven distinct Florida habitats, including cypress dome, oak scrub, pine flatwood, palm hammock, mangrove, marsh, and cypress/palm forest. These natural ecosystems will be blended with planned botanical gardens such as tropical islands, bamboo forests, deep jungles, and rainforests to provide an experience that accomplishes the Garden's simple mission: to connect people with plants. Through this connection, the Naples Botanical Gardens hopes to inspire and educate its guests to be more responsible stewards of the world we share.

**Completion date:** 2009

**Size:** 160 Acres

**Sustainability Rating:** LEED Certified

**Team Member Role(s):** Stantec provided site engineering, environmental permitting, surveying, and construction management services.

# Moorings Park

Naples, FL | Owner: Moorings Park, Inc.



Moorings Park is a nationally accredited Medicare certified Continuing Care Retirement Community established in 1975. The development includes independent living, assisted living and skilled nursing facilities and, as such, Stantec has developed not only an engineering understanding of the facility but also an operational understanding of the various services that are the cornerstone of a successful adult living community.

Stantec has been involved since the project inception assisting the client, Moorings Park Health Center Association, with services including public meetings, master planning, landscape recommendations, civil engineering, and survey.

The expansive 82.9 acre site includes multiple 8-story apartment towers, 5-story mid-rise apartment buildings, 3-story garden apartments, clubhouse, chapel, amenity areas, and meandering waking paths complete with lush flower gardens and lake-side gazebos.

**Completion date:** 2008

**Size:** 365 units

**Team Member Role(s):** Stantec has provided site master planning, landscape architecture, civil engineering, and survey services.

# Bonita Springs Downtown Improvement Project

Bonita Springs, FL | Owner: City of Bonita Springs



This \$16 million improvement project along the Old US 41 corridor in the City of Bonita Springs will help beautify Bonita Springs' downtown, spur economic growth, and create a unique sense of place. The project also includes Felts Street located one block east of Old US 41 and the connecting streets. Stantec landscape architects were part of the Wright Construction design-build team awarded the improvements project. Through a series of public engagement workshops, the project team gained an understanding of the needs and concerns of both the residents and business owners who will be impacted by the improvements to the project area. With a mix of pros and cons to change, the project team has taken their wishes into consideration for the design of the project elements—roadway, bridge, sidewalk, streetscape, and drainage infrastructure improvements. Stantec is producing all conceptual streetscape design components including vehicle travel lanes, on-street and off-street parking configurations, bicycle, and pedestrian needs. The scope also includes all detailed hardscape elements, furnishings, and site materials and finishes.

**Completion date:** 2015

**Construction cost:** \$16,000,000

**Size:** 600 Acres

**Team Member Role(s):** Stantec provided landscape architecture services.

# Arthrex Corporate Headquarters Entry & Parking Expansion

Naples, FL | Owner: Arthrex, Inc.



Stantec provided landscape architecture and civil engineering services for Arthrex Corporate Headquarters to create a new corporate entry feature, expand the parking and arrival drive, and provide a park-like setting for visitors and employees to use within the arrival and storm water dry pretreatment areas. The enhanced dry pretreatment areas were designed as storm water parks including aesthetic grading and native landscape with pathways, lighting, and benches across the project to create a visual backdrop to the arrival and parking areas signaling the corporate commitment to the natural environment. The site also provides employees and visiting medical professionals an opportunity to enjoy on break with a stroll through the park. The corporate entry feature was made an integral piece of the landscape delivery. By using materials that simulate or are part of the devices designed and manufactured daily by the company, the new water feature effortlessly floats the Arthrex logo atop a clear polymer basin of spilling water welcoming employees and visitors alike to the facilities. Stantec provided conceptual design, permitting, detailed design, and post design construction services.

Gulfshore Business 2015 Commercial Design Award

**Completion date:** 2014

**Size:** 4.7 Acres

**Team Member Role(s):** Stantec provided landscape architecture and civil engineering services.

# Naples 10th Street Beautification

Naples, FL | Owner: City of Naples



**Working with the City of Naples and the CRA District, Stantec designed streetscape improvements to 10th Street North** within an area that encompasses three distinct zones with differing character—commercial zone, residential zone and a linear park. Consisting of many small, locally-owned businesses, the commercial zone is an older area that was built before more stringent codes came into effect. The City worked with the merchants and business owners to develop consensus on the type of improvements that are desirable, including on-street parking, crosswalks, sidewalks, lighting, benches, and enhanced landscaping. The goal in the residential zone was to create a gateway to the Lake Park community and provide a consistent street tree pattern and sidewalks within the right-of-way. New landscaped medians create a visual image of entry to the residential community as well as serving as a traffic calming device. A new walkway with benches, lighting and supplemental canopy trees is designed to meander through the linear park. The design allows for future phases, including overlooks at the lake edge and connections to potential greenway/pedestrian facilities.

**Completion date:** 2006

**Size:** .75 miles

**Team Member Role(s):** Stantec provided the City of Naples with landscape architecture, civil engineering, surveying, opinion of probable cost, and construction document services.

# Pelican Bay

Naples, FL | Owner: Watermark Communities, Inc.



This prestigious 2,104-acre resort community offers three miles of beachfront along the Gulf of Mexico, exclusive homes, championship golf courses, and upscale shops. The community also includes Artis—Naples and Waterside Shops. Stantec has been a multidiscipline consultant providing overall project coordination, planning, site development, and civil engineering to Pelican Bay from initial permitting and PUD preparation to ongoing development. Stantec has served as District Engineer to the Pelican Bay Services District. Specific services provided were planning, engineering, environmental permitting, surveying, improvement district engineer, construction management, water management, neighborhood design, mangrove restoration, and Development of Regional Impact that included Artis—Naples, Waterside Shops, Naples Grande, and the Ritz Carlton. Most recently, Stantec has worked with Pelican Bay Foundation and the Pelican Bay Services Division to established goals of safety, security, and community branding. Market-based value driven solutions were developed to provide an outline for future sustainable and relevant community improvements

**Size:** 2,104 Acres

**Team Member Role(s):** Stantec provided overall project coordination, planning, site development, and civil engineering.

# Big Corkscrew Island Regional Park Planning

Naples, FL | Owner: Collier County Parks and Recreation



As part of Collier County's Northeast Area Master Planning process, Stantec provided planning and permitting services for the stormwater/water resources and land optimization for the development of Big Corkscrew Island Regional Park and the surrounding lands. The multidisciplinary team developed a series of master plan options that considered a stormwater management system to maximize the developable land and provide for passive recreation uses, roadways, parking, utilities, and park facilities. Stantec conducted two public workshops involving 175 participants and conducted an online survey with more than 1,400 respondents as part of the intensive community input process for the park. The meetings determined that the needs and desires of the public have changed. The park elements were reevaluated and ranked based on public input. The conceptual master plan, representing a detailed and exhaustive effort to bring together diverse groups and interests within our community, has been developed and approved by the Board of County Commissioners.

**Completion date:** 2016

**Size:** 156 Acres

**Team Member Role(s):** Stantec provided planning and permitting services.

# Artis - Naples Museum Addition and Office Building Expansion

Naples, FL | Client: HKS Architects, Inc.



Artis—Naples has served as Collier County's Broadway, concert hall, and teaching center for more than ten years. In the late 1980s, Stantec (fka WilsonMiller) provided the original site design and construction stake-out services for the 6.5-acre site located in the center of the upscale Pelican Bay development that houses Artis—Naples. Serving as subconsultant to the architect who is designing an additional 10,000 square foot museum and a two-floor office building, Stantec provided professional land planning, site engineering, surveying, and permitting services for the expansion.

Having been involved in the original planning and construction of the center proved to be an advantage in the recent addition project. The Stantec team was familiar with the site's constraints, and therefore recognized the challenge of providing additional parking to the site. Realizing this early on, the land planning team resolved the issue to the satisfaction of the County development review agency during the preliminary phase of the design.

**Completion date:** 2000

**Size:** 6.5 Acres

**Team Member Role(s):** Stantec provided land planning, site engineering, surveying, and permitting services.

# Tim Hancock

AICP - Senior Planner, Stantec

Site / Civil Consultant  
Contract Manager



## About Tim

Tim brings more than 25 years of local planning experience throughout South Florida to his projects. Having held the position of District 2 Collier County Commissioner from 1994-1998, as well as extensive work with both private and public sector clients throughout his career, he possesses valuable knowledge of the application of public policies and procedures on a given project. His background and experience includes hundreds of rezoning and land use applications, dozens of site analysis reports, project management through entitlement and permitting, as well as leading a variety of community visioning efforts and public facilitation workshops to help build consensus for community planning projects.

## Select Experience

### Big Corkscrew Island Regional Park, Collier County, Florida (Project Manager)

Spearheaded the public information campaign and dynamic community visioning effort for this 160-acre regional park, resulting in a citizen driven design process that culminated in a Master Plan that was approved by the Board of Commissioners in 2016.

### Collier County Bio-Solids Facility, Collier County, Florida (Project Manager)

Project management as the lead consultant for site planning and permitting of a new facility to effectively handle Bio-solids to increase re-use, reduce transportation costs and produce a beneficial by-product through emerging technology for Collier County Solid Waste and Public Utilities.

### Buckley Parcel Growth Management Plan Amendment and PUD Rezone, Collier County, Florida (Project Manager)

Coordinated an amendment to the Collier County Growth Management Plan and subsequent rezoning for this 21-acre mixed use development within urban designated lands. These revisions were critical to allow for a variety of uses, both commercial and residential, and developed a land uses strategy allowing for flexibility to respond to future market conditions.

### New Hope Mixed-Use Planned Unit Development, Collier County, Florida (Senior Planner and Project Manager)

Lead planner / project manager for this 39 acre rezone that will result in a mixed use Planned Unit Development for New Hope Church and 319 unit market rate residential apartments. The project will be under development in 2017.

### Collier County Resource Recovery Business Park (RRBP) IPUD Rezone, Collier County, Florida (Project Manager and Principal Planner)

Coordinated amending zoning for the 344-acre regional recovery business park to permit additional access points, increase permitted height within project, and update all relevant land use documents, including the crafting of the Industrial Planned Unit Development (IPUD) document.

### Collier County Library Community-Wide Assessment and Long Range Master Plan, Collier County, Florida (Project Manager)

Stantec was hired by the county library system to conduct a comprehensive community wide assessment of existing library services, programs, and facilities, while also aiding in the development of the library's first long range master plan.



## Professional Highlights

### Education

Bachelor of Arts in Geography, University of South Florida, Florida, 1992

### Registration & Licensing

Certified Planner, American Institute of Certified Planners

**Jared Beck**  
Stantec

**Site / Civil Consultant**  
Senior Planner / Project Manager



**About Jared**

Jared provides design and planning services for many of the firm’s most significant projects. He has applied his landscape architecture, urban design, urban planning, and artistic talents to numerous projects from upscale master planned communities to new town urban development throughout Florida. His belief and passion for developing solutions that not only meet the requirements but also fit within the greater form, combined with his expertise and ability to incorporate an array of solutions, lead to creative, yet functional designs. His projects have included master planning and design for new towns, urban cores and redevelopment, mixed used developments, and a wide variety of public spaces.

**Select Experience**

- Gateway to Charlotte Harbor, Charlotte County, Florida (Project Designer)
- Vanderbilt Beach Beautification Streetscape Master Plan, Collier County, Florida (Project Designer)
- Murdock Village, Charlotte County, Florida (Project Designer)
- SouthWood One, Leon County, Florida (Project Designer)
- Bonita Village, Lee County, Florida (Project Designer)
- Mayhood Dog Park, Bonita Springs, Florida (Project Designer)
- Paseo TND Village & Neighborhood Design, Lee County, Florida (Project Designer)
- Collier County Library Community-Wide Assessment and Long Range Master Plan, Collier County, Florida (Project Planner)

**Professional Highlights**

**Education**

Bachelor of Science, Landscape Architecture, Texas Tech University, Texas, 2000

**Registration & Licensing**

Certified Planner #027911, American Institute of Certified Planners

**Kevin G. Mangan**  
ASLA, Principal, Stantec

**Site / Civil Consultant**  
Landscape Architect



**About Kevin**

Kevin has practiced Landscape Architecture, Urban Design and Land Planning in the United States and International market place since 1985. Experience in the resort, leisure, hospitality, transportation, urban mixed use, parks and recreation, and community sectors of the profession has provided him with the passion and expertise for project management, planning and detailed design of complex, multi-disciplined projects. Serving in roles as managing principal, lead and contributing design team member, Kevin has forged long term relationships with his clients and professional team members that span over two decades of professional service.

**Select Experience**

- Treviso Bay, Naples, Florida (Project Manager)
- Pelican Bay, Naples, Florida (Principal, Landscape Architect and Planner)
- Downtown Redevelopment of Old US 41, City of Bonita Springs, Florida (Lead Landscape Architect)
- City of Naples 10th Street Beautification, Naples, Florida (Lead Landscape Architect)
- Baker Park Planning, City of Naples, Florida (Landscape Architect and Project Manager)
- Wyndham Bayfront San Diego, San Diego, California (Landscape Architect and Project Manager)
- Renaissance Vinoy, St. Petersburg, Florida (Lead Landscape Architect)
- Hard Rock Resort, Tampa and Hollywood, Florida (Principal, Landscape Architect)

**Professional Highlights**

**Education**

B.S., Landscape Architecture, State University of New York, College of Environmental Science and Forestry at Syracuse, 1985

**Registration & Licensing**

Registered Landscape Architect #0001337, State of Florida



**Michael T. Herrera**  
PE, Senior Project Manager, Stantec

**Site / Civil Consultant**  
Civil Engineer



### About Michael

Michael has over 17 years of experience consulting land development projects in Southwest Florida. His capabilities encompass the full development process from conceptual site planning to construction certification for residential, commercial, and mixed use projects. With a commitment to customer service and effective project management, Michael has successfully designed and constructed innovative solutions for small and large scale projects within the full array of permitting requirements.

### Select Experience

Creskide Commerce Business Park\*, Collier County, Florida (Project Manager/Engineer)  
Tesone, Lee County, Florida (Project Engineer)  
Ave Maria Park of Commerce\*, Collier County, Florida (Project Manager/Project Engineer)  
Collier's Reserve, Collier County, Florida (Project Manager/Engineer)  
Fiddler's Creek\*, Collier County, Florida (Project Manager/Project Engineer)  
Naples Lakes, Collier County, Florida (Project Manager/Engineer)  
Gulf Harbour, Collier County, Florida (Project Manager/Engineer)  
Bay Colony, Lee County, Florida (Project Manager/Engineer)  
Grey Oaks Clubhouse Expansion, Collier County, Florida (Project Engineer)  
Paloma, Bonita Springs, Florida (Project Manager/Engineer)  
Talis Park, Collier County, Florida (Project Engineer)

### Professional Highlights

#### Education

Bachelor of Science, Engineering, Colorado School of Mines, Golden, Colorado, 1997

#### Registration & Licensing

Professional Engineer #60110, State of Florida

**Jeff Perry**  
AICP, Stantec

**Project Role**  
Transportation Planner



### About Jeff

Mr. Perry holds regional management responsibilities for transportation planning services in Southwest Florida. He brings expertise in both public and private sector transportation planning and private sector land use planning and zoning. His credentials include several public sector management positions where he directed metropolitan transportation planning programs. He also has extensive experience in land use and growth management practices and is qualified as an expert witness in land use and growth management plans.

### Select Experience

Collier County General Transportation Planning & Traffic Engineering Services Consultant, Collier County, Florida (Senior Transportation Planner)  
Pine Ridge Road Corridor Congestion Study, Collier County, Florida (Project Manager and Principal Planner)  
Collier MPO 2040 Long-Range Transportation Plan Major Update Phase I, II, III, Collier County, Florida (Project Manager)  
Master Mobility Plan, Collier County, Florida (Project Manager and Principal Planner)  
Ave Maria University School of Law, Collier County, Florida (Senior Transportation Planner)  
Collier Regional Medical Center, Collier County, Florida (Senior Transportation Planner)  
Naples Botanical Garden, Collier County, Florida (Lead Transportation Planner)  
Naples Philharmonic Center & Museum Expansion, Collier County, Florida (Lead Transportation Planner)

### Professional Highlights

#### Education

Associate of Arts, Edison State College, Fort Myers, Florida, 1970

#### Registration & Licensing

Certified Planner #9614, American Institute of Certified Planners



## MEP Engineer - Arts Village

Burgess Engineering, Inc. (dba – Burgess Brant, Consulting Engineers) was established in Lee County in 1965. The firm specializes in electrical and mechanical engineering design for commercial, institutional, residential, and healthcare facilities. The staff at Burgess Brant, Consulting Engineers (BBCE) brings over 85 years of design and field experience in the state of Florida.

BBCE offers a complete range of mechanical and electrical design, construction administration, and inspection services including:

### Building Systems Design

- Electrical Power Distribution
- Interior & Exterior Electrical Lighting Design
- Electrical Lighting Photometrics Design
- HVAC Design
- Plumbing Systems Design
- Fire Alarm Design
- Communication Systems Design
- Fire Protection (Sprinkler) Systems Design & Pumps
- Building Envelope and I.A.Q. Consultation
- Building Energy Analysis
- LEED Design

### Building Inspection

- Code Compliance Investigation
- Insurance Claims Investigation
- Association Turnover Inspection
- Personal Injury Investigation
- Fire Forensics

### Power Generation

- Stand-By Power Generation & Controls
- Emergency Systems Design

### Multi-Family Housing / Condominiums

- The OASIS @ Singer Island
- Beau Rivage, Fort Myers, FL
- The Pink Shell, Fort Myers Beach, FL
- Pointe Royale Condominiums, Fort Myers, FL.
- Sunset Vista Condominiums, Fort Myers, FL.
- Contessa Condominium, Naples, FL.
- Vanderbilt Commons Condominiums
- Gull Wing Condominium, Fort Myers Beach, FL.
- Ocean Harbour Condominium, Fort Myers Beach, FL
- Twin Dolphins Condominiums,
- Boardwalk Caper Condominium Tower
- Gulf Breeze Condominiums

**Mark A. Brant**  
PE, Burgess Brant Consulting Engineers

**MEP Engineer - Arts Village**  
Mechanical Engineer

### Experience & Responsibilities

Mr. Brant has been employed since 1997 in M.E.P. design. He received his Bachelor of Science Degree in Mechanical Engineering in 1993. He became a licensed Professional Engineer in 1999. Prior to working with Burgess Brant Consulting Engineers, he was the principal and owner of Mark A. Brant, P.E. L.L.C. Mr. Brant has extensive experience in indoor air quality remediation, code interpretation, plumbing, fire sprinkler, electrical and HVAC design. His consultation and construction experience is extensive in the following areas.

### Project Design Experience

- Single and Multifamily Residential (Low, Mid, and High Rise)
- Educational (Schools, Administrative, Universities)
- Commercial (Banks, Offices, Restaurants, Sports, Gymnasiums, Motels, Hotels, Parking Buildings)
- Industrial (Waste and Potable Water Treatment Facilities and Storage)
- Institutional/Government (Jails, Government Office Buildings, Laboratories)
- Medical
- LEED certified design

### Professional Affiliations

- Building Envelope Seminar Coordinator
- Junior League of Fort Myers, Community Advisory Board
- S.W. Florida A.S.H.R.A.E. Chapter President
- Edison Pageant of Light Member
- Edison Festival of Light Volunteer
- Holiday House Volunteer

### Professional Highlights

#### Education

B.S.M.E. (Mechanical Engineering), University of Texas at Austin

#### Registration & Licensing

Professional Engineer: FL #54592

**Joseph W. Broughton**  
PE, President, Burgess Brant

**MEP Engineer - Arts Village**  
Electrical Engineer

### Experience & Responsibilities

Mr. Broughton has been employed in electrical design since 1997, receiving his Bachelor of Science Degree in Electrical Engineering in 2001 and becoming a licensed Professional Engineer in 2006. In 2008 Mr. Broughton became the President of Burgess Engineering, Inc. and has retained this position with Burgess Brant, Consulting Engineers. Mr. Broughton is the Principal Electrical Engineer at Burgess Brant. He has been involved in the design of lighting systems (including photometric analysis and certification), lighting control system design and layout, power distribution system design (including secondary power sources), telecommunication system layout, and building inspections of the fore mentioned systems.

### Project Design Experience

As the Principal Electrical Engineer at Burgess Brant, Mr. Broughton is the lead electrical engineer for all projects. This entails the design and review of all projects and the certification of all electrically related designs. He has experience in design of all types of electrical systems, including:

- Single and Multifamily Residential (Low, Mid, and High Rise)
- Educational (Schools, Administrative, Sports Lighting)
- Commercial (Banks, Offices, Restaurants, Sports, Gymnasiums, Motels, Hotels, Parking Buildings)
- Industrial (Waste and Potable Water Treatment Facilities)
- Recreational (Sports Lighting of Soccer, Baseball, Football, Tennis)
- Municipal (Roadway Lighting, Pumping Stations, Administrative Buildings, and Fire Stations, EMS Facilities and Airport Hangers)
- Medical
- LEED certified design

### Professional Affiliations

- Member of Rotary International – The Rotary Club of Fort Myers
- Member of National Fire Protection Agency
- Member of Board of Trustees for the Southwest Florida Symphony Orchestra

### Professional Highlights

#### Education

B.E.E., Electrical Engineering, Louisiana State University

#### Registration & Licensing

Professional Engineer: FL #63949



**Project Name:** Kraft Office Center **Location:** Naples, Florida



## Structural Engineer - Arts Village

Select Structural is the largest full-service Structural Engineering firm in Southwest Florida. Offering a wide-array of design, construction, and inspection services, our team of engineering professionals have completed projects of every size and type over an impressive range of building and building material types in Florida, nationally, and abroad.

Select Structural provides quality professional services on projects requiring structural design, analysis, and drafting, as well as inspection services, and is a fully licensed and insured professional structural engineering firm offering a high-level of expertise and hands-on customer service approach to clients.

### Locations

Fort Myers, Florida

### Services

Select Structural provides a full-array of Structural Engineering services including but not limited to:

- |                            |                                 |
|----------------------------|---------------------------------|
| New construction           | Additions                       |
| Renovation/Restoration     | Structural/threshold inspection |
| Concrete design            | Steel design                    |
| Post-tension design        | Expert witness testimony        |
| Value Engineering analysis |                                 |

# AQUA

Sarasota, FL | Owner: Aqua Homeowners



Developed by Jonathan McCague and Michael Adams, and designed by Guy Peterson|Office for Architecture, AQUA is an exclusive modern condominium housing eight waterfront residences, (one per floor), each with a private elevator foyer and private two-car garage.

AQUA's structural design includes a concrete slab construction, and it's exterior incorporates a "see-through" concept with extensive use of glass to maximize the views of the bay and city. Several water features were designed and incorporated throughout the building and the lobby is a two-story vertical space.

This 35,000sf, \$10million project on the Sarasota Bay, was completed in 2016.

**Completion date:** 2016

**Construction cost:** \$10million

**Size:** 7-story, 35,000sf

**Team Member Role(s):** Select Structural; Shawn Anderson, PE, SE - Structural Engineer

# Harbour Isles Beach Club

Bradenton, FL | Owner: Minto Communities



Structural Engineering for this 23,000sf Beach Club within the Harbour Isles community. The new beach club includes a resort-style pool, a 4,200-square-foot fitness center, a second-floor bar and clubroom and a ground floor activity and event hall.

**Completion date:** 2015

**Construction cost:** \$7 million

**Size:** 23,000 TSF

**Team Member Role(s):** Select Structural - Structural Engineers; Humphrey Rosal - Architects

# Grey Oaks Country Club Wellness

Naples, FL | Owner: Grey Oaks Country Club



Select Structural provided Structural Engineering for the new 30,000-sq. ft. facility in Naples, FL. The project includes a 3,000-sq. ft. ambulatory care clinic for minor emergency and basic primary care that is staffed four days a week. The Wellness Center includes a 11,000-sq. ft. gym floor, fitness studios, yoga and bocce lawn, spa, relaxation suite and Wellness Café.

**Completion date:** 2017  
**Construction cost:** \$9 million  
**Size:** 30,000 TSF

**Team Member Role(s):** Select Structural - Structural Engineers; Humphrey Rosal - Architects

# Isles Club

Naples, FL | Owner: Isles of Collier Preserve



Select Structural provided Structural Engineering for the new Isles Club for the Isles of Collier Preserve. Club amenities include a resort-style swimming pool and lap pool with private, poolside cabanas; fitness center; multi-purpose room; tennis courts; yoga lawn; lushly landscaped event courtyard; and kayak and paddleboard launch.

**Completion date:** 2016  
**Construction cost:** \$4.8 million  
**Size:** 16,000 TSF

**Team Member Role(s):** Select Structural - Structural Engineers; Humphrey Rosal - Architects

**Shawn Anderson**  
PE, SE - President, Select Structural



**Structural Eng. Arts Village**  
Lead Structural Engineer



**About Shawn**

Mr. Anderson has over 33 years of structural engineering experience in the successful completion of high-profile projects in the State of Florida, nationally, and over-seas. A large body of his work experience includes the new design and additions of Institutional buildings including hospitals, assisted living facilities, clinics, schools, universities, and churches, however, his diverse engineering background covers nearly all areas of structural design. He has specialized training and experience in concrete and steel, high-rise residential and commercial structures, post-tension, seismic, and wind-load design, as well as analysis for renovation and restoration.

**Select Experience**

**Collier's Reserve Country Club; Naples, FL**

\$13.8 million new fitness and activities center.

**Westin Cape Coral Resort at Marina Village; Cape Coral, FL**

Tarpon Landings I, II, and III: Tthree high-rise luxury condominiums

**AQUA Exclusive Condominiums; Sarasota, FL**

Concrete slab, 35,000sf, \$10million condominium building housing eight waterfront residences

**Isles Club; Naples, FL**

**Harbour Isles Beach Club; Bradenton, FL**

23,000sf Beach Club within the Harbour Isles community.

**Professional Highlights**

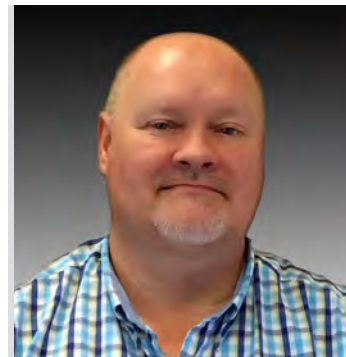
**Education**

M.S. in Civil Engineering, Portland State University,  
B.S. in Civil Engineering, Montana State University

**Registration & Licensing**

Structural Eng.: FL Reg.Threshold Inspector:  
for: FL | Structural & Civil Eng.: CA, OR | Prof.  
Eng.: VA, NC, TX, OH, MT, TN, AZ, NY, MI,  
MN, GA, WY ,LA, SC

**Scott Lewkowski**  
PE, Select Structural



**Structural Eng. Arts Village**  
Structural Engineer



**About Scott**

Mr. Lewkowski has over 25 years of structural engineering experience in the design of commercial, institutional, military and residential buildings composed of structural steel, steel joists, metal trusses, cast-in-place concrete, precast concrete, masonry and wood. In his role as Senior Structural Engineer at Select Structural, he oversees entire projects from the schematic design phase of construction administration. This includes consultatio nwith clients and design team during the schematic and design development process to develop and integrate concepts for the structural aspects of the project.

**Select Experience**

**Avida Senior Living; Fort Myers, FL**

**Porto Recanti Condominium; Fort Myers, FL**

**Harbour Isles Clubhouse; Bradenton, FL**

**Ebassy Suites 18-story tower; Sarasota, FL**

**Gartner Building 2; Fort Myers, FL**

**St. John's County Emergency Operations Center; St. Johns County, FL**

**Community Christian Church; Tamarac, FL**

**Pasco Hernando Community College; Wesley Chapel, FL**

**Professional Highlights**

**Education**

B.S. in Civil Engineering, 1982, University of Notre  
Dame, Notre Dame, IN

**Registration & Licensing**

Licensed Structural Professional Engineer,  
FL, AZ



*At-a-Glance:*

- Founded in 1978 as Graeme Young & Associates of Edmonton; merged with Avison & Associates in 1996 to form Avison Young.
- In 2009, began international expansion and has since opened 53 offices in the U.S., five in Canada, eight in Europe and one in Mexico.
- Recognized for the last five years as one of Canada’s Best Managed Companies. Named #1 among Fastest-Growing Companies in commercial real estate by Real Estate Forum in

*Key Statistics:*

|   | 2008   | 2016    |
|---|--------|---------|
| Real Estate Professionals                       | 300    | 2,200   |
| Number of Offices                               | 11     | 77      |
| Property Under Management (million square feet) | 15 msf | 100 msf |



## Capital Markets Services

| INVESTMENT ADVISORY   | INVESTMENT SALES  | FINANCING   |
|---|---|---|
| <ul style="list-style-type: none"> <li>• Asset and Entity Level Recapitalization</li> <li>• Equity Private Placement</li> <li>• Programmatic Acquisition Capital</li> <li>• Joint Ventures</li> <li>• Buy Side Advisory</li> </ul>  | <ul style="list-style-type: none"> <li>• Asset &amp; Portfolio Sales</li> <li>• Note Sales</li> <li>• Ground Lease/Leasehold Sales</li> <li>• Sale Leaseback</li> <li>• Forward Pre-Sale Commitments</li> </ul>   | <ul style="list-style-type: none"> <li>• Construction Loans</li> <li>• Fixed Rate Permanent Financing</li> <li>• Bridge Loans</li> <li>• Mezzanine Loans</li> <li>• Note Acquisition Financing</li> </ul> |
| ASSET TYPES   | CLIENT BASE   |   |
| <ul style="list-style-type: none"> <li>• Office, Industrial, Retail, Multifamily, Hotel, Land</li> <li>• Healthcare: MOB, Assisted Living, Nursing home</li> <li>• Data Centers, Parking, Self-Storage, Other</li> <li>• Cross-Border Transactional Expertise</li> <li>• Development and Redevelopment</li> </ul> | <ul style="list-style-type: none"> <li>• Private Real Estate Owners</li> <li>• REITs &amp; Mortgage REITs</li> <li>• Insurance Co's, Pension Funds &amp; Advisors</li> <li>• Private Equity Funds &amp; Hedge Funds</li> <li>• Foreign/Sovereign Investors</li> </ul> |   |

***Avison Young is the fastest growing real estate firm*** in North America. The Capital Markets team is comprised of senior professionals working seamlessly cross-border to deliver real estate solutions for our clients. For over 30 years, Avison Young has been a leader in directing Canadian capital into U.S. and Canadian investments, providing real estate expertise to corporate clients and providing real estate solutions to our international clients. Our expertise has expanded organically in all asset classes, including office, industrial, retail, multi-family, land, and hotel. Avison Young has a proven track record of exceeding client expectations.

## Core Team Members | Domestic Domiciled Capital



**Dan E. Gorczycki**  
Sr. Director – Capital Markets  
Debt, JV & Structured Capital

D: 212.729.7087  
C: 516.816.5200  
Dan.gorczycki@avisonyoung.com

Dan Gorczycki is a Senior Director in the New York office focusing on debt and equity capital placements with a focus on acquisition financing, construction financing and equity raises. He also provides investment advisory and consulting services to Avison Young CRE clients in New York. He also provides investment management services for clients.

Mr. Gorczycki came to Avison Young in 2015 after 15 years at Savills Studley (and predecessor company Granite Partners where he was a partner and Head of the Debt Group) and closed over \$3 billion of financing and sale transactions in his tenure there. He financed several large assets there including 600 Madison Avenue in New York, 33 Arch Street in Boston, 18 Park Avenue in Jersey City, several malls in the Midwest and Southeast, a 10-building apartment portfolio in Ohio, Curtis Center and the Public Ledger Buildings in Philadelphia, Snell Isle Apartments in St. Petersburg, Florida, and completed the largest ever marina financing on three marinas in Tampa, Naples, and Key West, Florida. Further, he worked on several investment sales transactions both at Savills Studley and at other stints in his career.

Prior to Savills Studley, Gorczycki had stints at HFF, Dorman & Wilson (now part of Northmarq), Landauer (now part of Grubb & Ellis), and Greater New York Savings Bank (now part of Astoria Federal Savings Bank). Mr. Gorczycki started his career at Price Waterhouse and Salomon Brothers, Inc.

Mr. Gorczycki is a Certified Public Accountant in New York State (inactive) and is a regular columnist for the Commercial Observer. He received his B.S. at St. John's University and his M.B.A. from New York University.



## Core Team Members | Cross Border



**Earl Webb**  
President, US Operations  
Capital Markets Group

M: 847.849.1900  
D: 312.957.7610  
Earl.webb@avisonyoung.com

Earl Webb was named President, U.S. Operations of Avison Young in September 2009. Earl is responsible for leading geographic and service line expansion efforts in the U.S. as well as heading all Avison Young U.S. operations.

Earl has spent 24 years in senior positions with Jones Lang LaSalle. For the last seven years he served as CEO, Capital Markets Group, responsible for strategic direction and management of all capital markets activities and oversight of personnel and transaction activities in investment sales, corporate finance, debt and structured finance, and real estate investment banking for the firm's clients. From 1999 to 2002, he was CEO of Jones Lang LaSalle Americas, directing all of the firm's corporate solutions, investor services and capital markets business throughout the Americas region.

Prior to his appointment as Americas CEO, Webb served for five years as Managing Director and Group Head of Capital Markets in the U.S., expanding the business practice to include the full scope of investment banking services while also completing a number of notable transactions for clients. Prior to joining Jones Lang LaSalle, Earl served as second Vice-President in the capital markets group at Continental Illinois National Bank. He has served as a Board member for Players International, Inc., Site Stuff, Inc., and Jones Lang LaSalle.



**Amy Erixon**  
Principal & Managing Director,  
Investments  
Capital Markets Group

M: 416.955.0000  
D: 416.673.4034  
Amy.erixon@avisonyoung.com

Amy Erixon joined Avison Young in August of 2010 to develop the company's cross-border investment activities. Prior to joining Avison Young, Ms Erixon was Chief Executive Officer of IGRI, a privately held Canadian investment and development company, which she joined in 2005. While at IGRI she grew third party assets under management to \$800 million and oversaw completion of in excess of \$1 billion of investments and development.

Prior to IGRI she spent 12 years at LaSalle Investment Management where she served as International Director, founded and led the firm's Canadian and Mexican operations and led development and hotel investment activities. Prior to joining LaSalle, Ms. Erixon served as a regional partner for two leading development companies completing in excess of \$0.8 billion of land investment and development projects in 5 states and 2 Canadian provinces.



**Udo Stoeckl**  
European Investment Manager  
Capital Markets Group

M: +49 69 7593 8200  
D: +49 69 7593 7233  
udo.stoeckl@avisonyoung.com

Since January 2011 Udo is in charge for our European – North American Cross Boarder activities. In this capacity, Udo initiated and completed transactions of about C\$150 million in various asset classes and markets. Udo Stöeckl holds a Bachelor of Arts degree from University of Cooperative Education Mosbach, Germany and earned a post graduate degree in real estate economics in 2008 from International Real Estate Business School in Essen, Germany.

Udo Stöeckl began his career in 2001 as a trainee at Commerzbank, Germany's second largest financial institution. In 2004, he started as an analyst with Commerz Real AG in Düsseldorf before becoming acquisition manager for North American commercial real estate markets. Between 2004 and 2010 Udo has completed a number of acquisitions and dispositions with a total value of C\$2.3 billion.





*Fairway Funding Group works as a mortgage funding source for buyers of Banroc Corporation real estate projects. To maximize loan approvals, Fairway Funding Group provides special assistance to Banroc clients. This includes a complete and thorough pre-approval process for buyers, assuring they will qualify for loans. Fairway Funding Group also provides buyers hands-on assistance with credit repair that greatly increases the number of sales Banroc is able to secure. Fairway Funding Group and Banroc also have no-money-down programs and construction to perm loans for buyers.*

### Residential mortgage financing is our only business.

Following the constant changes in the mortgage market and banking guidelines since 2000, Fairway Funding Group is able to provide a financing solution for many borrowers. Our strong relationships with nationwide investors allow for even the most out-of-the-box loan to be financed. We have developed relationships with the premier lenders in the country, and are able to offer an extensive number of loan programs at very competitive rates not available through local banks or other financial institutions.

### Lending with a personal touch.

Fairway Funding Group is committed to providing the highest level of personalized customer service to our borrowers. We know that every client is different and every client situation and circumstance is different. So we come alongside our borrowers, walking through the loan process with them every step of the way. At Fairway Funding Group, our borrowers are names, not numbers.

### Closing loans fast.

Because Fairway Funding Group is a lender, we are able to use expanded guidelines and use an array of loan programs not always available to larger banks or financial institutions. This allows us to not only close loans that might not otherwise close, but it allows us to close loans fast. Most of our loans close in 30 days.

### Financing options for all types of borrowers.

Conventional | FHA | VA | USDA | JUMBO | Portfolio Loans | Construction to Perm | Second Mortgage | Foreign Nationals Bank Statement Loans | Reverse Mortgages

- High LTVs up to 97% on primary home, and up to 85% on second home purchases
- Warrantable and non-warrantable condo programs using Conventional, FHA, & VA financing options if approved condo complex
- 80% LTV on investment property condo

#### Joe Lepiscopo

941-330-6669

Joe@FairwayFundingGroup.com

NMLS#: 648748

8235 Natures Way

Lakewood Ranch, FL 34202

www.FairwayFundingGroup.com



# Engel & Völkers Olde Naples

## Representing the area's best

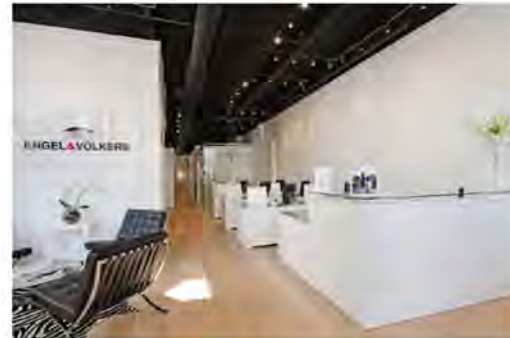
Many brokerages are established in the States and then expand into International markets. Engel & Völkers is proud to be a European brand with **headquarters in Hamburg** and a growing network spanning over **37 countries** in 7 continents.

Engel & Völkers Olde Naples opened its doors **4 years ago**. Our team has guided homebuyers and sellers through their transaction process with **ease** and meticulous attention to details. Our advisors have an affinity for exclusive properties and a clear **service-driven** mentality. We are particularly responsive here to our client's wishes and have the ability to impress and inspire them.

### We service the following areas and subdivisions:

- Downtown Naples
- Port Royal
- Aqualane Shores
- Coquina Sands
- Park Shore/Moorings
- Bonita Bay
- Bonita Beach
- Plus many more luxury real estate developments

We are located on the first block of prestigious Fifth Avenue South. Our chic boutique-style conference rooms are the ideal setting to present our marketing services and market analysis to assist you in achieving your real estate goals.



# **D. Additional Information**

**Signed Attachments 2-4**

**Design & Construction Team Licenses**

**VPAC Additional Information**

**Opera Naples and CAPA IRS 990s**

Attachment 2: Vendor Check List

**IMPORTANT: THIS SHEET MUST BE SIGNED. Please read carefully, sign in the spaces indicated and return with your Proposal.** Vendor should check off each of the following items as the necessary action is completed:

- The Proposal has been signed.
- All applicable forms have been signed and included, along with licenses to complete the requirements of the project.
- Any addenda have been signed and included.

Name of Firm: BANROC CORPORATION  
 Address: 837 FIFTH AVE SOUTH SUITE 102  
 City, State, Zip: NAPLES FL 34102  
 Telephone: 941 716 0720  
 Email: HARRY@BANROC.CORP.COM  
 Representative Signature: *R. H. Bandinel*  
 Representative Name: ROLAND HARRY BANDINEL Date AUG 24 2017

Attachment 3: Conflict of Interest Affidavit

The Proposer certifies that, to the best of its knowledge and belief, the past and current work on any Collier County project affiliated with: 17-7167 Bayshore Gateway Triangle Community Redevelopment Agency (BGT CRA) 17-Acre Land Development Proposal does not pose an organizational conflict as described by one of the three categories below:

**Biased ground rules** – The firm has not set the “ground rules” for affiliated past or current Collier County project identified above (e.g., writing a procurement’s statement of work, specifications, or performing systems engineering and technical direction for the procurement) which appears to skew the competition in favor of my firm.

**Impaired objectivity** – The firm has not performed work on an affiliated past or current Collier County project identified above to evaluate proposals / past performance of itself or a competitor, which calls into question the proposer’s ability to render impartial advice to the government.

**Unequal access to information** – The firm has not had access to nonpublic information as part of its performance of a Collier County project identified above which may have provided the proposer (or an affiliate) with an unfair competitive advantage in current or future solicitations and contracts.

In addition to this signed affidavit, the proposer must provide the following:

1. All documents produced as a result of the work completed in the past or currently being worked on for the above mentioned project; and,
2. Indicate if the information produced was obtained as a matter of public record (in the “sunshine”) or through non-public (not in the “sunshine”) conversation (s), meeting(s), document(s) and/or other means.
3. Failure to disclose all material or having an organizational conflict in one or more of the three categories above be identified, may result in the disqualification for future solicitations affiliated with the above referenced project(s).

By the signature below, the firm (employees, officers and/or agents) certifies, and hereby discloses, that, to the best of their knowledge and belief, all relevant facts concerning past, present, or currently planned interest or activity (financial, contractual, organizational, or otherwise) which relates to the project identified above has been fully disclosed and does not pose an organizational conflict.

Firm: BANROC CORPORATION  
 Signature and Date: *R. H. Bandinel* AUG 25 / 2017  
 Print Name: ROLAND H. BANDINEL  
 Title of Signatory: PRESIDENT

State of Florida County of Collier  
 SUBSCRIBED AND SWORN to before me this 25 day of August, 2017  
 by Roland H. Bandinel, who is personally known to me to be the  
President for the Firm, OR who produced the following identification  
FL DL # B535-72P-55-323-0  
Jan 15 Notary Public Commission Expiration 3-13-2020

*[Handwritten Signature]*

**Jarline M. O'Neil**  
Notary Public  
State of Florida  
My Commission Expires 3/13/2020  
Commission No. FF 870558



Attachment 4: Vendor Declaration Statement

BOARD OF COUNTY COMMISSIONERS
Collier County Government Complex
Naples, Florida 34112

RE: Solicitation: 17-7167 Bayshore Gateway Triangle Community Redevelopment Agency (BGCRA) 17-Acre Land Development Proposal

Dear Commissioners:

The undersigned, as a Proposer, declares that this proposal is made without connection or arrangement with any other person and this proposal is in every respect fair and made in good faith, without collusion or fraud.

The Proposer agrees, if this proposal is accepted, to execute a Collier County document for the purpose of establishing a formal contractual relationship between the firm and Collier County, for the performance of all requirements to which the proposal pertains. The Proposer states that the proposal is based upon the proposal documents listed by the above referenced Solicitation 17-7167 Bayshore Gateway Triangle Community Redevelopment Agency (BGCRA) 17-Acre Land Development Proposal.

(Proposal Continued on Next Page)

PROPOSAL CONTINUED

IN WITNESS WHEREOF, WE have hereunto subscribed our names on this 24 day of AUGUST, 2017 in the County of COLLIER, in the State of FLORIDA

Firm's Legal Name: BANROC CORPORATION
Address: 837 FIFTH AVE SOUTH SUITE 102
City, State, Zip Code: NAPLES FL 34102
Florida Certificate of Authority Document Number: P 14000013218
Federal Tax Identification Number: 46-4805872
CCR # or CAGE Code: 531390
Telephone: 941 716 0720
FAX: 239-692 9443
Signature by: ROLAND H. BANDINEL
Title: PRESIDENT

Additional Contact Information
Send payments to: BANROC CORPORATION
Company name used as payee: ROLAND HARRY BANDINEL
Contact name: HARRY BANDINEL
Title: PRESIDENT
Address: 837 FIFTH AVE SOUTH SUITE 102
City, State, ZIP: NAPLES FL 34102
Telephone: 941 716 0720
FAX: 239 692 9443
Email: HARRY@BANROCCORP.COM

Office servicing Collier County to place orders (required if different from above)
Contact name: ROLAND BANDINEL
Title: PRESIDENT
Address: 837 FIFTH AVE SOUTH SUITE 102
City, State, ZIP: NAPLES FL 34102
Telephone: 941 716 0720 Email: HARRY@BANROCCORP.COM





Email: SwainsonHall@colliergov.net  
Telephone: (239) 252-8935  
FAX: (239) 252-6334

**ADDENDUM #1**

**Memorandum**

**Date:** June 30, 2017  
**From:** Swainson Hall, Procurement Manager - Acquisitions  
**To:** Potential Proposers  
**Subject:** Addendum #1 – 17-7169 Bayshore Gateway Triangle Community Redevelopment Agency (BGCRA) 17-Acre Land Development Proposal

The following clarifications are issued as an addendum identifying the following changes for the referenced solicitation:

**CHANGE:**

- 1. Posting Pre-Proposal Meeting Sign-in Sheets (See Attached)
- 2. Posting list of vendors that downloaded the solicitation (See Attached)

If you require additional information please contact me using the above contact information.

c: Tami Scott, Project Manager

Please sign below and return a copy of this Addendum with your submittal for the above referenced solicitation.

*[Handwritten Signature]*  
\_\_\_\_\_  
(Signature) *AUG 24 2017*  
\_\_\_\_\_  
Date  
*BANROC CORPORATION*  
\_\_\_\_\_  
(Name of Firm)

# Design & Construction Team Licenses

## GATES

- John Allan Hayes - General Contractor License Number CGC1516270 (exp. 08/31/2018)

## DLR Group

- Architect Firm COA AAC001829 (exp. 2/28/2019)
- Engineering Firm COA 6518 (exp. 2/28/2019)
- Interior Design Firm COA IB26001067 (exp. 2/28/2019)
- Paul E. Westlake, Jr. - Florida Architect AR0016164 (exp. 2/28/2019)
- Jason Majerus – Florida Professional Engineer 64009 (exp. 2/28/2019)
- Murad Hamdallah - Florida Professional Engineer 76270 (exp. 2/28/2019)

## SchenkelShultz Architecture

- Architect Firm COA AAC000937 (exp. 2/28/2019)
- Daniel C. Laggan - Florida Architect AR94736 (exp. 2/28/2019)
- Ronald E. Reitz – Florida Architect AR92144 (exp. 2/28/2019)

## Humphrey Rosal Architects

- David Michael Humphrey – Florida Architect AR0009763 (exp. 02/28/2019)
- Randolph G. Rosal – Florida Architect AR0015060 (exp. 02/28/2019)

## Burgess Brant

- Burgess Brant Consulting Engineers CA Lic. No. 6032 exp. 02/28/2019
- Joseph W. Broughton - Florida Professional Engineer #63649 exp 02/28/2019
- Mark A. Brant - Florida Professional Engineer PE #54692 exp 02/28/2019

## Select Structural

- Shawn Robert Anderson, PE PE 53515 / SI Lic. No: 1178 (exp. 02/28/2019)

## Stantec Engineering

- Stantec Consulting Services Inc. – Florida Board of Professional Engineers CA Lic. No 27013 (exp. 02/28/2019)
- Stantec Consulting Services Inc. – Florida Board of Landscape Architecture License Number: LC26000488 (exp. 11/30/2017)
- Jared Beck, AICP – American Institute of Certified Planners Number 027911
- Kevin Mangan, ASLA – Landscape Architect License Number: LA0001337
- Michael Herrera, PE – Civil Engineer Florida PE Lic. No. 60110 (02/28/2019)



100067.107617



100067.107617

Index

Without Prejudice

June 24, 2017

For electronic submission & distribution

Swainson Hall  
Procurement Manager - Acquisitions  
Collier County  
Board of County Commissioners  
Procurement Services Division  
3327 Tamiami Trail East  
NAPLES FL 34112-4901

Dear Sir,

Visual and Performing Arts Center (VPAC), a local non-profit, is submitting its application for the "Cultural Component" of Solicitation 17-7169 Bayshore Gateway Triangle / Community Redevelopment Agency (BGTCRA), "a multi-use cultural facility suitable for art, cultural and/or performing venues" in partnership with the developer chosen by Collier County for this site.

VPAC thanks the Collier County Board of County Commissioners for this opportunity.

Sincerely,

VISUAL & PERFORMING ARTS CENTER

Add Jerry's signature

Jerry Goldberg

Chick Heithaus

1. Cover Letter
2. Index
3. VPAC is Ready to Provide the Cultural Component
4. Cultural Component: Scope of Work
5. Who is VPAC?
6. Letter from the President of CAPA
7. Who is CAPA?
8. Letter from the Chairman of the Board, Opera Naples
9. Who is Opera Naples?
10. VPAC keeps lines of Communication Open
11. Extract of VPAC's Signed Memorandum of Understanding with Developers
12. Survey of Performance Space & Use Requirements in Collier County
13. Types of Performances at the new Center
14. Groups that have signed Memoranda of Understanding with VPAC
15. Groups that Endorse Building the Center
16. Impact of the Arts and the Center on the Community
17. Description of Architect-Ready Design and Conceptual Site Plan
18. Project Consultants
19. Existing Performance Centers in Collier County
20. Construction Costing
21. Construction Fund
22. Appendix: VPAC Documents
23. RFP required attachments
24. In Closing, VPAC is Ready to Provide the Cultural Component

VPAC is ready to Provide the Cultural Component

- ✓ Preparations for this project have been underway for the past 10 years.
- ✓ VPAC has consulted with community groups to incorporate their needs.
- ✓ VPAC has an architect-ready design by a renowned theater designer.
- ✓ Center will feature two performance spaces and much, much more.
- ✓ VPAC commissioned a detailed costing report.
- ✓ VPAC has the firm support of important arts organizations.
- ✓ The Center will serve small and midsized groups in Collier County which are currently underserved.
- ✓ A quiet-phase capital campaign is already underway.
- ✓ Developers have expressed confidence in partnering with VPAC.
- ✓ VPAC is ready!



Cultural Component: Scope of Work

2012 rezoning to Bayshore Drive Mixed Use Overlay District-Neighborhood Commercial (BMUD-NC) permits a 350 fixed-seat performance theater and ancillary uses.

Cultural component:  
A multi-use cultural facility suitable for art, cultural and/or performing venues.

Extensive public access for festivals and other community activities.



Who is VPAC?

Visual and Performing Arts Center, (VPAC), is a non-profit, created for the sole purpose of funding, building and operating a visual and performing arts center in Collier County for shared use by more than 88 midsize and small community groups.

VPAC is a partnership between Bayshore Cultural & Performing Arts Center (CAPA) and Opera Naples, both 501(c)(3)s.

VPAC is structured to accept donations for capital funding and operating costs.

VPAC bylaws and Articles of Incorporation are available upon request at the address below, as are those of CAPA and Opera Naples.



Letter from the President of CAPA

*"There is no better indicator of the spiritual health of a city, its neighborhoods, and the larger region than the state of the arts. The arts deepen our understanding of the human spirit, extend our capacity to comprehend the lives of others, allows us to imagine a more just and humane world. Through their diversity of feeling, their variety of form, their multiplicity of inspiration, the arts make our culture richer and more reflective."*

*- Jonathon Fanton, Past President of the MacArthur Foundation*

CAPA is an amazing, forward-thinking gathering of people who give generously of all their resources. Our programs are well organized and effective.

While the number of Collier County artists and arts groups has grown significantly since 2000, facilities to accommodate performances, rehearsals and exhibitions have not kept pace. The anticipated VPAC Cultural and Performing Arts Center enjoys the support of nearly all the local visual and performing arts groups, ranging from Naples Players to the CEO of Artis--Naples.

Twenty-nine of Collier County's 50+ non-profit cultural and performing arts organizations have made public endorsements of the Cultural and Performing Arts Center mission. Nine of these (to date) have already signed Memoranda of Understanding documenting arts-center design requirements and how often they may rent performance space when the arts center is ready for performances.

Based on professional market studies, we know that the facility must involve at least a 700-seat theater (complete with an orchestra pit, "fly space" and side- and back-stage staging areas), a community arts/activity center with an intimate theater, adequate parking and, if feasible, an outdoor amphitheater.

The VPAC Center will:

- ✓ meet the present and future needs of the emergent population and increasing tourism in our region;
- ✓ enrich and expand available arts opportunities for audiences of all ages and incomes.
- ✓ provide community classroom and studio space for educational classes and seminars.
- ✓ stimulate economic activity.
- ✓ be a cost-effective solution to meet the space requirements of numerous organizations without duplication of under-used and economically-unjustified facilities.

Chick Heithaus, CAPA Board President

Who is CAPA?



CAPA  
239 Airport-Pulling Rd. S  
Naples, FL 34104  
Chick Heithaus  
239-775-2800  
[info@capacenter.org](mailto:info@capacenter.org)

Bayshore Cultural & Performing Arts Center comprises one half of VPAC leadership. Founded in Naples, Florida November 11, 2004 CAPA's focus has been: *To develop a new arts center to better serve the audiences and artists of Collier County. Once built, the Visual and Performing Arts Center will offer a broad variety of programming such as opera, musical theater, ballet, orchestra, chorus & chamber series, artist studios and gallery exhibition space just to name a few.*

CAPA currently produces three distinctive, successful concert series annually. Youth and children are a very important, central component.



Letter from the Chairman of the Board, Opera Naples

Opera Naples made its official debut with a Viennese-style New Year's ball on the eve of 2006. Since then its many performances in a wide variety of venues have consistently earned rave reviews and standing ovations.

Opera Naples has stayed true to its Mission: To enrich the Southwest Florida community by presenting opera performances and educational programs which engage internationally renowned performers and directors while nurturing regionally-based talent through the creation of a permanent local opera company.

Within the scope of this mission Opera Naples has chosen to be an integral part of the local and regional community, actively contributing to and being a part of the area's rich cultural landscape. Opera Naples takes pride in its Young Artists Program and a Student Apprentice program, promoting an artistically challenging environment for promising young people entering the world of music, song and theater for the first time, and those with more advanced skills.

During the past 12 years of operation Opera Naples has become firmly established as the city's opera company and an important part of the cultural life of the region. We are proud to have earned local, regional and state government support, and are very grateful to our sponsors, donors and patrons who continue to encourage us and grow in number.

Opera Naples is fortunate to have the David and Cecile Wang Opera Center focusing on cultural arts. This facility houses administrative offices, rehearsal rooms, set and costume storage and the Judy and John Hushon Theater, which seats 260.

To meet the full expression of their mission in the community Opera Naples has a long-standing need for an identifiable home to produce and deliver Grand Opera performances. This has led Opera Naples to help establish a collaboration of like-minded nonprofit organization. Experience has demonstrated that a performing arts complex created to meet the needs of many groups will be more successful than a single-purpose building.

The Collier County Community Redevelopment Agency recently issued an ITN on the 17 acres on Bayshore Drive. This opportunity has stimulated the formation of a new 501(c) (3) nonprofit collaboration -- Visual and Performing Arts Collaboration. The founding members are Opera Naples and CAPA. VPAC has attracted the attention of the Developers who plan to respond to the ITN. We will promote the synergy of a Cultural Arts Village with a multipurpose Performing Arts complex that will satisfy a range of uses, headlining that of Grand Opera.

**Jerry Goldberg's signature.**

Jerry Goldberg, Chairman of the Board, Opera Naples

**Who is Opera Naples?**

**VPAC keeps lines of communication open!**

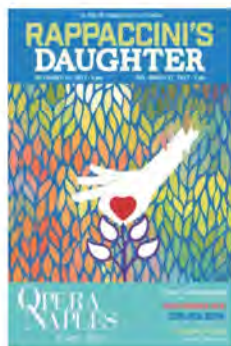


Opera Naples  
2408 Linwood Avenue  
Naples FL 34112  
Jerry Goldberg  
239-963-9050  
Jerrygoldberg2001@yahoo.com

Opera Naples comprises the other half of VPAC leadership.

Founded in 2004, Opera Naples is firmly established as Southwest Florida's premier opera company. We are proud to have the support and encouragement of the city, county and state, and grateful to the many loyal and generous donors who have helped make this happen. We reach out to a diverse public through multi-level educational programs and high-quality productions presented in a variety of venues throughout the region. We strive to enrich the cultural landscape and quality of life in Southwest Florida through the gift of music, song and theater. Opera Naples hosts a summer youth program annually.

The Wang Center, home to Opera Naples, serves as the centerpiece of the Davis Triangle Redevelopment Zone in East Naples, an area focusing on cultural arts. The site was purchased and the building funded largely by private donations from individuals like David and Cecile Wang, for whom the Center is named, and by grants from the State of Florida. The center is believed to be the first of its kind in Southwest Florida devoted to public musical performance and multiple age levels of education.



Recent email sent to local community:

We need you!

Collier County has published an Invitation to Negotiate (ITN) for the County's 17.8 acres on Bayshore Drive that, among other stipulations, asks for proposals that are innovative in terms of mixed use commercial and housing, but also provide a community catalyst in the form of a new performing arts center.

Opera Naples and CAPA have joined forces to form a new non-profit: Visual and Performing Arts Collaboration (VPAC) for the purpose of receiving land on which to fulfill the dream of a new performing arts center.

There will be, we predict, at least several developers competitively bidding. One of them, of course, will prevail and we expect that it will be one of those with whom we have a Memorandum of Understanding (MOU) specifying that VPAC will then be given a portion of that land on which to design, fund, build and then operate a new Cultural Center.

We (VPAC) are preparing an ITN-response-style document describing our missions and track record, a document that each proposing developer can draw from in creating their individual bid for the overall property.

We hope to include your name in a list of those giving us an indication of support – for Opera Naples and CAPA as the leadership to get this accomplished. Clearly there are a number of hurdles to get past but we are energized and tackling the various issues as we identify them.

*Please simply **respond "yes"** to me by return e-mail ([chickheit@haus@gmail.com](mailto:chickheit@haus@gmail.com)) to indicate your expression of endorsement of VPAC's (CAPA's and Opera Naples) mission and your consent to be listed as such on our website and other literature*

*(See Appendix for list of supportive respondents.)*

**Extract of VPAC’s Signed Memorandum of Understanding with Developers**

Several Developers have signed Memoranda of Understanding with VPAC seeking to collaborate on this project. The “meat” of it follows:

NOW, THEREFORE, the parties hereto have agreed to enter into this MOU on the following terms and conditions:

1. Land Grant. In the event DEVELOPER purchased the BAYSHORE CRA PARCEL from BAYSHORE CRA, DEVELOPER will donate to VPAC, free of charge to VPAC, subject to the terms and conditions of the MOU: (a) a portion of the BAYSHORE CRA PARCEL for purposes of the PAF and (b) access and use of a parking facility for 300 cars to be located no further than 150 yards from the entrance to the PAF (the PARKING GARAGE).

Exclusive Right to Design and Build. Subject to DEVELOPER’S acquisition of the BAYSHORE CRA PARCEL, VPAC hereby grants to DEVELOPER the exclusive right to design and build on that BAYSHORE CRA PARCEL the FACILITY and any out structures and facilities. VPAC and DEVELOPER will enter into a building design and build contract for the FACILITY, out structures and facilities. VPAC will develop, fund and provide DEVELOPER a detailed net square footage requirement analysis and project Cost Report for the complete FACILITY and DEVELOPER shall enter into an AIA “Cost Plus with a Guaranteed Maximum Price” contract, with DEVELOPER charging \_\_\_% of the cost of construction for the design and \_\_\_% of the construction cost as construction fee.

VPAC will have certain decision-making authority over the design and of the FACILITY; provided, however all design (architectural and engineering) of the FACILITY, out structures and facilities will be exclusively performed by DEVELOPER.

VPAC shall retain full control over costs and all work will be submitted for bidding; provided, however, the joint approval of DEVELOPER and VPAC shall be required for any selection of any subcontractor. All site development and infrastructure (including, without limitation, all underground construction, water, sewer, utilities, roads, parking, sidewalks and water retention and management) shall be at the sole discretion and design of the DEVELOPER in order to ensure compatibility with the Bayshore Arts Village design. VPAC shall be required to become a member of the “Bayshore Arts Village” Residential and Commercial Owners Association when formed.

**Survey of Performance Space & Use Requirements in Collier County**

A survey of space and use requirements of the performing arts in Collier County was completed by CAPA in 2012. The study revealed two distinct target groups in need of space – large performing arts organizations needing 900 or more seats – and small organizations needing 400 or fewer seats. In total over 88 groups were approached. Many struggle to offer or rehearse their programs in borrowed, temporary, inadequate or expensive space. A dedicated multi-purpose performance and visual arts center will go a long way to enabling them to better serve Collier County residents.

**Large Groups needing 900 or more seats**

- |  |                                  |
|--|----------------------------------|
| 1. Opera Naples                        | 9. Collier County Public Schools |
| 2. Naples Orchestra & Chorus           | 10. Classic Chamber Concerts     |
| 3. Paradise Coastmen Barbershop Chorus | 11. Gulf Coast Big Band          |
| 4. Naples Academy of Ballet            | 12. Naples Jazz Orchestra        |
| 5. Naples Big Band                     | 13. Naples Jazz Society          |
| 6. TheatreZone                         | 14. Stardust Memories Big Band   |
| 7. Seacrest Country Day School         | 15. Voices of Naples             |
| 8. Stay In May Festival                | 16. Chorus of the Everglades     |

**71 Small Groups needing 400 or fewer seats**

- ✓ Shakespeare in Paradise
- ✓ New Horizons Concert Band
- ✓ Tir Na Nog
- ✓ Naples Music Club
- ✓ Hyacinth Series
- ✓ 22 Chamber Groups
- ✓ 12 Jazz Performing Groups
- ✓ 11 Bluegrass, Folk, Country, R&B, Rock, Roots, Indie and Americana Groups
- ✓ 21 Jazz, Ballet, Tap, Folk, Ethnic and other Dance Groups

**Visual Art Exhibition Space**

- 500 local visual artists-in-residence



**Types of Performances at the new Center**

The highly utilized and efficient VPAC Center will offer a broad variety of programming, such as:

- ✓ Musical Theatre, Opera and Ballet
- ✓ Orchestra, Chorus and Chamber Series
- ✓ Many Dance and Music genres
- ✓ Artist Studios and an Art Gallery Exhibition space
- ✓ Intimate cabaret performances and jazz series
- ✓ Local and National Music and Art Festivals on the outdoor lawn
- ✓ Collaborative events with Naples Botanical Garden, Universities and local schools
- ✓ Education programs – Summer camps, after-school youth programs, arts academies, children-at-risk programs and adult education

**Groups that have Signed Memoranda of Understanding with VPAC**

The following groups have signed Memoranda of Understanding formally committing utilization of and advisory support to the new Visual & Performing Arts Center in Collier County.



**Groups that Endorse Building the Center**

The following groups, including the District School Board of Collier County, endorse building the Center and have committed to renting space for their performances and programs.

**PARTICIPATING ENDORSERS**

**Impact of the Arts and the Center on the Community**

**Economic:**

“By every measure, the results of *Arts & Economic Prosperity 5* prove that the arts are an industry—a generator of government revenue, a cornerstone of tourism, and an employment powerhouse both locally and across the nation,” said **Robert L. Lynch**, president and CEO of Americans for the Arts. June 2017.

“On the average, people were spending \$32 per event... and that doesn’t include the price of admission.” “Revenue from the arts in Collier County was \$3.5 million to local governments, and \$7.5 million to state governments,” said **Laura Burns**, executive director of the United Arts Council of Collier County. June 16, 2017 (*Charles Runnells, Arts and Entertainment Reporter, newspress.com*)

**Education:**

Exposure to the arts cultivates learning, builds cultural understanding, mutual respect, communication skills and fosters greater interaction within the community. The Center will serve Collier County schools by providing affordable, professional performance space as well as access to artists and art.

**Social:**

By virtue of its location, the Center will immediately be a community focal point. The Center, built and managed by VPAC will create community between residents, art groups and artists. Small to mid-size arts groups, currently strewn across the county, will no longer scramble for reliable, affordable (let alone professional) space. They will have a hub, a home!

**Conclusion:**

VPAC is ready to build Collier County’s vision for “a multi-use cultural facility suitable for art, cultural and/or performing venues” - a state-of- the-art center with flexible space showcasing local visual and performing arts groups and artists that appeal to a wide variety of artistic tastes and preferences.

The center, professionally managed by VPAC, will provide revenue and employment, and offer the residents of Collier County a variety of performances in an enjoyable setting.

**Description of Architect-Ready Design**

A 54,000 square-foot Performing Arts Theater (performance building) equipped with theatrical lighting controls, stage rigging, orchestra lift, orchestra shell, fly space (to enable set removals, making this the only theatre in Collier County with this feature), sound/communications/video, fixed seating for up to 900, acoustically excellent, ballet sprung flooring, proscenium stage with orchestra pit and backstage. Costs for this building are estimated at \$42,600,000.

A 22,000 square-foot Community Arts Center (visual arts center) featuring an acoustically-mastered studio theater with adjustable seating for 150-250, rehearsal rooms, arts and crafts studio, (for Naples Art Association children's programs and Naples Players KidzAct program) art studios, educational and gallery space, sound-proofed rehearsal spaces, administrative and storage space for arts groups, outdoor performance space and parking. Costs for this building are estimated at \$12,000,000.

The groundwork is laid with large, midsize and small local arts and music organizations and artists in support of this project at this site.

A Professional Gross Square Footage Requirement Analysis and Project Cost Report provide the foundation for the design and build. VPAC plans to open the doors in 3-4 years.

**Conceptual Site Plan**

Will be available when VPAC has been provided with site plan details.

**Project Consultants**

**Joshua Dachs, Fisher-Dachs Associates, Principal**



Joshua Dachs is one of the world's leading theatre consultants. Trained as an architect and theatrical lighting designer, he directs Fisher-Dachs Associates consulting practice and provides planning, programming and design leadership. In over 25 years of practice he has helped plan and design hundreds of successful projects. In early phases he helps clients conceptualize and plan their projects, and during the design phase focuses on room shaping, seating layouts and sightlines, backstage layouts and overall spatial organization.

**Steven A. Wolff, AMS Planning & Research, Principal**



Steven A. Wolff, CMC is the founding Principal of AMS Planning & Research and AMS Analytics. He works from the firm's Connecticut headquarters. For over 25 years, Steven has provided counsel to leading arts, culture and entertainment enterprises on strategic initiatives, the planning and development of capital facilities and arts market and consumer research.

**Mark Holden, Jaffe Holden, FASA Chairman**



With JaffeHolden Since 1978, Mark is Chairman and a lead designer of acoustics. He has collaborated on hundreds of diverse performance and exhibition space designs throughout the world. Mark thrives on the creative design processes that call on his skills as an engineer, physicist, musician, communicator and collaborator to create superior acoustic environments.

**Stewart Donnell, Principal**



Mr. Donnell has over 30 years experience in the North American construction market in both contracting and professional practices. He has been instrumental in advancing cost control techniques worldwide for governmental, institutional and private sector clients. Heriot Watt University, Edinburgh, Bachelor of Science, Building (HONS); Fellow, Royal Institution of Chartered Surveyors; Member, Canadian Institute of Quantity Surveyors

**Steve Monder, Executive Director Cincinnati Symphony Orchestra**



Executive Director Cincinnati Symphony Orchestra and Cincinnati Pops for 31 years: the longest tenured chief executive of any American orchestra, Steve forged the CSO/Pops relationship with Telarc International producing 120 recordings, established the Cincinnati Pops, and formed the collaborative agreement that created full time employment for CSO musicians.

**Russ Hodge, The Hodge Group, Principal**



Russ currently serves as Principal of The Hodge Group, one of the fastest growing fundraising consulting firms in the nation. His hands-on management style and innovative fundraising technique has been the blueprint for his success in achieving philanthropic goals for a variety of organizations.

**Existing Performance Centers in Collier County**

***Fort Myers***

- ✓ Barbara B Mann, FGCU = 2200 seats

***North Naples***

- ✓ Naples Hayes Hall at ARTIS-Naples = 1440 seats
- ✓ Daniels Pavilion at ARTIS-Naples = 350 seats (no proscenium)

***Scattered throughout Collier County***

- ✓ Spaces in High Schools, churches and private event centers = up to 1,200 seats

***South Naples (proposed)***

- ✓ VPAC Building 1 – 900 seats (fixed)
- ✓ VPAC Building 2 – 150-250 seats (flexible)
- ✓ Affordable, designated, professional performance spaces for small to mid-sized groups in Collier County.

In early 2000, the creation of the Bayshore Gateway CRA formally committed funds to renew this area. Botanical Place residences were built in 2006, the Naples Botanical Gardens opened in 2008, several older rental apartment condominiums were renovated and converted to condominiums. Hamilton Harbor - a full-service marina - opened in 2008 and in the summer of 2012 Minto Homes purchased a 2,300-acre site on which they are building 1,600 residences.

Collier County and private developers have made a historic commitment to Bayshore Gateway, a testament to its locational importance.

VPAC is ready to provide the Cultural Component!

**Construction Costing**

|  | <u>2012</u>            | <u>2018</u>            |
|--|------------------------|------------------------|
| Theatre Cost*                            | \$38,000,000.00        | \$42,600,000.00        |
| Gross Floor Area                         | 53,900                 | 53,900                 |
| Theatre Construction Costs only          | \$19,250,000.00        | \$21,600,000.          |
| Cost PSF – Theatre Building              | \$357.14               | \$400.74               |
| Community Center Cost*                   | \$10,700,000.00        | \$12,000,000.00        |
| Gross Floor Area                         | 21,750                 | 21,750                 |
| Community Center Construction Costs only | \$5,600,000.00         | \$6,300,000.00         |
| Cost PSF – Community Center              | \$257.47               | \$289.65               |
| Site Development Costs                   | \$1,300,000.00         | \$1,500,000.00         |
| <b>TOTAL</b>                             | <b>\$50,000,000.00</b> | <b>\$56,100,000.00</b> |

Note: Numbers extracted from Donnell Consultants Inc. Report December 2012.

Said report includes interior & exterior finishes, space allotments, equipment specifications etc.

2018 projections assume a 2% per annum increase.

\*Costs include seating, performance equipment & 25% for project soft costs



11/08

Construction Fund

As a newly-formed non-profit specifically established to accept donations for capital funding and operating costs of a new Visual and Performing Arts Center, VPAC and the founding 501(c)(3) organizations (CAPA and Opera Naples) are ready to collaborate on this project.

Collier County's request for a Cultural Component for the Bayshore Gateway Triangle provides an opportunity for a Visual and Performing Arts Center located adjacent to residences and restaurants.

This project will be very attractive to VPAC donors due to its collaborative framework and its geographic location.

Once the ITN issued on the 17.8-acre CRA property results in the selection of a developer, VPAC will have specifics of the site plan including the location and size of the lands to be set aside for the Performing Arts Center. VPAC will then adapt its design to fit the parameters, thus establishing the size, framework and timing of the construction fund.

Major donors will be comfortable committing funds once VPAC is able to provide proof of a firm commitment from the County, the developer as well as site specific details.

A public-phase capital campaign is scheduled to commence September 2017. A quiet-phase campaign is already underway.

VPAC has established local fiduciary relationships which will accept land pledges and letters of commitment to facilitate the escrowing of restricted funds.

Government and Foundation grants will be sought to help acquire funding sources for the building as well as developing escrows for operational needs.



11/08

Appendix: VPAC Documents

VPAC, a non profit, was formed in 2017. No forms are available at this time.

The following documents are available at CAPA offices (see address below).

- ✓ List of VPAC supporters in response to email sent
- ✓ VPAC Articles of Incorporation
- ✓ VPAC Bylaws
- ✓ CAPA Articles of Incorporation
- ✓ CAPA Bylaws
- ✓ Opera Naples Articles of incorporation
- ✓ Opera Naples Bylaws
- ✓ CAPA 2016 IRS Form 990
- ✓ CAPA 2015 IRS Form 990
- ✓ CAPA 2014 IRS Form 990
- ✓ Opera Naples 2016 IRS Form 990
- ✓ Opera Naples 2015 IRS Form 990
- ✓ Opera Naples 2014 IRS Form 990



### RFP Required Attachments

- ✓ Vendor's Non-Response Statement - non applicable
- ✓ Vendor Check List
- ✓ Conflict of Interest Affidavit
- ✓ Vendor Declaration Statement (2 pages)

23 of 24



### In Closing, VPAC is ready to Provide the Cultural Component

- ✓ Preparations for this project have been underway for the past 10 years.
- ✓ VPAC has consulted with community groups to incorporate their needs.
- ✓ VPAC has an architect-ready design by a renowned theater designer.
- ✓ Center will feature two performance spaces and much, much more.
- ✓ VPAC commissioned a detailed costing report.
- ✓ VPAC has the firm support of important arts organizations.
- ✓ The Center will serve small and midsized groups in Collier County which are currently underserved.
- ✓ A quiet-phase capital campaign is already underway.
- ✓ Developers have expressed confidence in partnering with VPAC.
- ✓ VPAC is ready!



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Form 990-EZ

Short Form Return of Organization Exempt From Income Tax

OMB No 1545-1150

2012

Open to Public Inspection

Under section 501(c), 527, or 4947(a)(1) of the Internal Revenue Code (except black lung benefit trust or private foundation)
Sponsoring organizations of donor advised funds, organizations that operate one or more hospital facilities, and certain controlling organizations as defined in section 512(b)(13) must file Form 990 (see instructions)
All other organizations with gross receipts less than \$200,000 and total assets less than \$500,000 at the end of the year may use this form
The organization may have to use a copy of this return to satisfy state reporting requirements

Department of the Treasury Internal Revenue Service

A For the 2012 calendar year, or tax year beginning 01-01-2012, and ending 12-31-2012

- B Check if applicable: Address change, Name change, Initial return, Terminated, Amended return, Application pending

C Name of organization: BAYSHORE CULTURAL AND PERFORMING ARTS CENTER INC
Number and street (or P O box, if mail is not delivered to street address) Room/suite: 4069 BAYSHORE DRIVE
City or town, state or country, and ZIP + 4: NAPLES, FL 34112

D Employer identification number: 20-1793831
E Telephone number: (239) 775-2800
F Group Exemption Number

G Accounting Method: [X] Cash [ ] Accrual [ ] Other (specify)

H Check [ ] if the organization is not required to attach Schedule B (Form 990, 990-EZ, or 990-PF)

I Website: www.bayshorecapa.org

J Tax-exempt status (check only one): [X] 501(c)(3) [ ] 501(c)( ) (insert no) [ ] 4947(a)(1) or [ ] 527

K Check [ ] if the organization is not a section 509(a)(3) supporting organization or a section 527 organization and its gross receipts are normally not more than \$50,000

L Add lines 5b, 6c, and 7b, to line 9 to determine gross receipts. If gross receipts are \$200,000 or more, or if total assets (Part II, line 25, column (B) below) are \$500,000 or more, file Form 990 instead of Form 990-EZ. \$ 174,172

Part I Revenue, Expenses, and Changes in Net Assets or Fund Balances (see the instructions for Part I)

Check if the organization used Schedule O to respond to any question in this Part I [X]

Table with 21 rows and 2 columns. Rows 1-9: Revenue (Total: 174,172). Rows 10-17: Expenses (Total: 204,719). Rows 18-21: Net Assets (Total: 15,196).

Return of Organization Exempt From Income Tax

2013

Open to Public Inspection

Under section 501(c), 527, or 4947(a)(1) of the Internal Revenue Code (except private foundations)

Do not enter Social Security numbers on this form as it may be made public.

Information about Form 990 and its instructions is at www.irs.gov/form990.

Department of the Treasury Internal Revenue Service

Header section A-M containing organization details: BAYSHORE CULTURAL AND PERFORMING ARTS CENTER, INC, 2400 TAMiami TRAIL N., NAPLES, FL 34103.

Part I Summary

Summary table with columns for Revenue, Expenses, and Net Assets or Fund Balances. Includes rows for mission statement, revenue (86230), expenses (85032), and net assets (15196).

Part II Signature Block

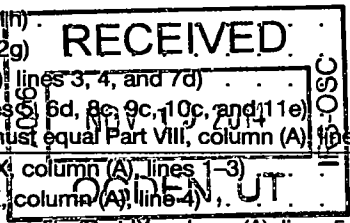
Under penalties of perjury, I declare that I have examined this return, including accompanying schedules and statements, and to the best of my knowledge and belief, it is true, correct, and complete.

Signature of officer: Steve Kutler, Treasurer, dated 11-14-14.

Preparer information: Steve Kutler, Treasurer, with firm name and address.

May the IRS discuss this return with the preparer shown above? (see instructions) Yes No

SCANNED DEC 05 2014



6177



# Return of Organization Exempt From Income Tax

OMB No. 1545-0047

**2014**

Open to Public Inspection

Under section 501(c), 527, or 4947(a)(1) of the Internal Revenue Code (except private foundations)

Do not enter social security numbers on this form as it may be made public.  
 Information about Form 990 and its instructions is at [www.irs.gov/form990](http://www.irs.gov/form990).

Department of the Treasury  
Internal Revenue Service

**A** For the 2014 calendar year, or tax year beginning January 1, 2014, and ending December 31, 2014

**B** Check if applicable:  
 Address change  
 Name change  
 Initial return  
 Final return/terminated  
 Amended return  
 Application pending

**C** Name of organization: BAYSHORE CULTURAL AND PERFORMING ARTS CENTER, INC  
 Doing business as: CAPA CULTURAL AND PERFORMING ARTS CENTER  
 Number and street (or P.O. box if mail is not delivered to street address): 2400 TAMiami TR. N  
 Room/suite: STE 303  
 City or town, state or province, country, and ZIP or foreign postal code: NAPLES, FL 34103

**D** Employer identification number: 20-1793831  
**E** Telephone number: 239-775-2800  
**G** Gross receipts \$: 340243

**F** Name and address of principal officer: STEVE KUTLER  
 2400 TAMiami TR. N STE 303 NAPLES, FL 34103  
**H(a)** Is this a group return for subordinates?  Yes  No  
**H(b)** Are all subordinates included?  Yes  No  
 If "No," attach a list. (see instructions)

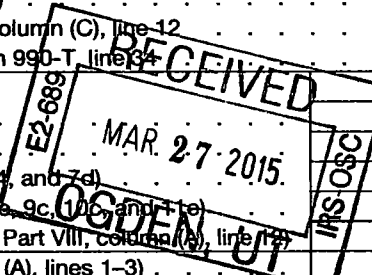
**I** Tax-exempt status:  501(c)(3)  501(c) ( ) (insert no.)  4947(a)(1) or  527

**J** Website: [www.capacenter.org](http://www.capacenter.org)  
**H(c)** Group exemption number ▶

**K** Form of organization:  Corporation  Trust  Association  Other ▶  
**L** Year of formation:  
**M** State of legal domicile

**Part I Summary**

|                             |  |   |                                  |                      |
|-----------------------------|--|---|----------------------------------|----------------------|
| Activities & Governance     | <b>1</b>   | Briefly describe the organization's mission or most significant activities: TO PROVIDE A STATE-OF-THE-ART CULTURAL CENTER THAT SHOWCASES LOCAL VISUAL AND PERFORMING ARTISTS. THEREBY OFFERING AFFORDABLE AND ACCESSIBLE EDUCATIONAL, CULTURAL, AND PERFORMANCE OPPORTUNITIES FOR THE COMMUNITY |                                  |                      |
|                             | <b>2</b>   | Check this box <input type="checkbox"/> if the organization discontinued its operations or disposed of more than 25% of its net assets.   |                                  |                      |
|                             | <b>3</b>   | Number of voting members of the governing body (Part VI, line 1a)   | <b>3</b>                         | 14                   |
|                             | <b>4</b>   | Number of independent voting members of the governing body (Part VI, line 1b)   | <b>4</b>                         | 14                   |
|                             | <b>5</b>   | Total number of individuals employed in calendar year 2014 (Part V, line 2a)  | <b>5</b>                         | 4                    |
|                             | <b>6</b>   | Total number of volunteers (estimate if necessary)  | <b>6</b>                         | 150                  |
|                             | <b>7a</b>  | Total unrelated business revenue from Part VIII, column (C), line 12  | <b>7a</b>                        |                      |
| <b>7b</b>                   | Net unrelated business taxable income from Form 990-T, line 34 | <b>7b</b>   |                                  |                      |
| Revenue                     | <b>8</b>   | Contributions and grants (Part VIII, line 1h)   | Prior Year: 333028               | Current Year: 305872 |
|                             | <b>9</b>   | Program service revenue (Part VIII, line 2g)  | 13501                            | 26146                |
|                             | <b>10</b>  | Investment income (Part VIII, column (A), lines 3, 4, and 7d)   |                                  | 199                  |
|                             | <b>11</b>  | Other revenue (Part VIII, column (A), lines 5, 6d, 8c, 9c, 10c, and 11e)  |                                  |                      |
|                             | <b>12</b>  | Total revenue—add lines 8 through 11 (must equal Part VIII, column (A), line 12)  | 346529                           | 332217               |
| Expenses                    | <b>13</b>  | Grants and similar amounts paid (Part IX, column (A), lines 1–3)  |                                  |                      |
|                             | <b>14</b>  | Benefits paid to or for members (Part IX, column (A), line 4)   |                                  |                      |
|                             | <b>15</b>  | Salaries, other compensation, employee benefits (Part IX, column (A), lines 5–10)   | 11864                            | 63736                |
|                             | <b>16a</b>   | Professional fundraising fees (Part IX, column (A), line 11e)   |                                  |                      |
|                             | <b>b</b>   | Total fundraising expenses (Part IX, column (D), line 25) ▶   |                                  |                      |
|                             | <b>17</b>  | Other expenses (Part IX, column (A), lines 11a–11d, 11f–24e)  | 325443                           | 224988               |
|                             | <b>18</b>  | Total expenses. Add lines 13–17 (must equal Part IX, column (A), line 25)   | 337307                           | 288724               |
| <b>19</b>                   | Revenue less expenses. Subtract line 18 from line 12           | 9222  | 43493                            |                      |
| Net Assets or Fund Balances | <b>20</b>  | Total assets (Part X, line 16)  | Beginning of Current Year: 27204 | End of Year: 98288   |
|                             | <b>21</b>  | Total liabilities (Part X, line 26)   | 228                              | 29                   |
|                             | <b>22</b>  | Net assets or fund balances. Subtract line 21 from line 20  | 23979                            | 98259                |



SCANNED APR 01 2015

**Part II Signature Block**

Under penalties of perjury, I declare that I have examined this return, including accompanying schedules and statements, and to the best of my knowledge and belief, it is true, correct, and complete. Declaration of preparer (other than officer) is based on all information of which preparer has any knowledge.

**Sign Here**

Signature of officer: *Stephen Kutler* Date: 3/13/15  
 Type or print name and title: Stephen Kutler, Vice President & Treasurer

**Paid Preparer Use Only**

Print/Type preparer's name: Preparer's signature: Date: Check  if self-employed PTIN:  
 Firm's name ▶ Firm's EIN ▶  
 Firm's address ▶ Phone no.

May the IRS discuss this return with the preparer shown above? (see instructions)  Yes  No

916-19

13

Form **990**

Department of the Treasury  
Internal Revenue Service

**Return of Organization Exempt From Income Tax**

Under section 501(c), 527, or 4947(a)(1) of the Internal Revenue Code (except black lung benefit trust or private foundation)

▶ The organization may have to use a copy of this return to satisfy state reporting requirements

OMB No 1545-0047

**2011**

**Open to Public Inspection**

**A For the 2011 calendar year, or tax year beginning 07/01/11, and ending 06/30/12**

|   |   |   |   |
|---|---|---|---|
| <b>B</b> Check if applicable:<br><input type="checkbox"/> Address change<br><input type="checkbox"/> Name change<br><input type="checkbox"/> Initial return<br><input type="checkbox"/> Terminated<br><input type="checkbox"/> Amended return<br><input type="checkbox"/> Application pending | <b>C</b> Name of organization<br>OPERA NAPLES, INC  |   | <b>D</b> Employer identification number<br>42-1671038 |
|   | Doing Business As   |   | <b>E</b> Telephone number<br>239-514-7464             |
|   | Number and street (or P O box if mail is not delivered to street address)<br>2408 LINWOOD AVE |   | Room/suite  |
|   | City or town, state or country, and ZIP + 4<br>NAPLES FL 34112-4735                           |   | <b>G</b> Gross receipts \$ 896,685                    |
| <b>F</b> Name and address of principal officer<br>STEFFANIE PEARCE-VASQUEZ<br>2408 LINWOOD AVE<br>NAPLES FL 34112-4735  |   | <b>H(a)</b> Is this a group return for affiliates? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No<br><b>H(b)</b> Are all affiliates included? <input type="checkbox"/> Yes <input type="checkbox"/> No<br>If "No," attach a list. (see instructions) |   |
| <b>I</b> Tax-exempt status <input checked="" type="checkbox"/> 501(c)(3) <input type="checkbox"/> 501(c) ( ) (insert no) <input type="checkbox"/> 4947(a)(1) or <input type="checkbox"/> 527  |   | <b>J</b> Website: WWW.OPERANAPLES.COM <b>H(c)</b> Group exemption number ▶  |   |
| <b>K</b> Form of organization <input checked="" type="checkbox"/> Corporation <input type="checkbox"/> Trust <input type="checkbox"/> Association <input type="checkbox"/> Other ▶  |   | <b>L</b> Year of formation 2005   | <b>M</b> State of legal domicile FL                   |

**Part I Summary**

|   |  |   |                 |
|---|--|---|-----------------|
| <b>Activities &amp; Governance</b><br>MAR 25 2013<br>RECEIVED<br>MAR 11 2013<br>IRS-OSC<br>OPEN | <b>1</b> Briefly describe the organization's mission or most significant activities<br>TO ESTABLISH A YOUNG ARTISTS PROGRAM TO PROVIDE AN ARTISTICALLY CHALLENGING ENVIRONMENT FOR YOUNG ARTISTS |   |                 |
|   | <b>2</b> Check this box <input type="checkbox"/> if the organization discontinued its operations or disposed of more than 25% of its net assets  |   |                 |
|   | <b>3</b> Number of voting members of the governing body (Part VI, line 1a)   | 0   |                 |
|   | <b>4</b> Number of independent voting members of the governing body (Part VI, line 1b)   | 0   |                 |
|   | <b>5</b> Total number of individuals employed in calendar year 2011 (Part V, line 2a)  | 10  |                 |
|   | <b>6</b> Total number of volunteers (estimate if necessary)  | 0   |                 |
| <b>7a</b> Total unrelated business revenue from Part VIII, column (C), line 12                  | 0  |   |                 |
| <b>7b</b> Net unrelated business taxable income from Form 990-T, line 34                        | 0  |   |                 |
| <b>Revenue</b>  | <b>8</b> Contributions and grants (Part VIII, line 1h)   | Prior Year: 787,594 Current Year: 634,363   |                 |
|   | <b>9</b> Program service revenue (Part VIII, line 2g)  | 278,679 262,290   |                 |
|   | <b>10</b> Investment income (Part VIII, column (A), lines 3, 4)  | 26 32   |                 |
|   | <b>11</b> Other revenue (Part VIII, column (A), lines 5, 6d, 8c, 9c, 10c, and 11e)   | 64,942 0  |                 |
|   | <b>12</b> Total revenue - add lines 8 through 11 (must equal Part VIII, column (A), line 12)   | 1,131,241 896,685   |                 |
|   | <b>Expenses</b>  | <b>13</b> Grants and similar amounts paid (Part IX, column (A), lines 1-3)                  | 0 0             |
|   |  | <b>14</b> Benefits paid to or for members (Part IX, column (A), line 4)                     | 0 0             |
|   |  | <b>15</b> Salaries, other compensation, employee benefits (Part IX, column (A), lines 5-10) | 179,450 252,221 |
|   |  | <b>16a</b> Professional fundraising fees (Part IX, column (A), line 11e)                    | 0 0             |
|   |  | <b>b</b> Total fundraising expenses (Part IX, column (D), line 25) ▶ 104,529                |                 |
| <b>17</b> Other expenses (Part IX, column (A), lines 11a-11d, 11f-24e)                          | 731,961 704,567  |   |                 |
| <b>18</b> Total expenses Add lines 13-17 (must equal Part IX, column (A), line 25)              | 911,411 956,788  |   |                 |
| <b>19</b> Revenue less expenses Subtract line 18 from line 12                                   | 219,830 -60,103  |   |                 |
| <b>Net Assets or Fund Balances</b>  | <b>20</b> Total assets (Part X, line 16)   | Beginning of Current Year: 1,102,110 End of Year: 1,106,358                                 |                 |
|   | <b>21</b> Total liabilities (Part X, line 26)  | 423,467 487,818   |                 |
|   | <b>22</b> Net assets or fund balances Subtract line 21 from line 20  | 678,643 618,540   |                 |

**Part II Signature Block**

Under penalties of perjury, I declare that I have examined this return, including accompanying schedules and statements, and to the best of my knowledge and belief, it is true, correct, and complete Declaration of preparer (other than officer) is based on all information of which preparer has any knowledge

|                               |  |  |
|-------------------------------|--|--|
| <b>Sign Here</b>              | Signature of officer<br><i>Thomas S. Smith</i>   | Date<br>1/31/13  |
|                               | Type or print name and title<br>THOMAS SMITH CEO |  |
| <b>Paid Preparer Use Only</b> | Print/Type preparer's name<br>Jennifer Stampfli  | Preparer's signature<br>Jennifer Stampfli                            |
|                               | Firm's name ▶                                    | Date<br>03/01/13   |
|                               | Firm's address ▶                                 | Check <input type="checkbox"/> if self-employed<br>PTIN<br>P01456667 |
|                               | Firm's EIN ▶                                     | Phone no   |

May the IRS discuss this return with the preparer shown above? (see instructions)  Yes  No

For Paperwork Reduction Act Notice, see the separate instructions.

Handwritten marks: "47" and a signature.

**Return of Organization Exempt From Income Tax**

**2012**

Department of the Treasury  
Internal Revenue Service

Under section 501(c), 527, or 4947(a)(1) of the Internal Revenue Code (except black lung benefit trust or private foundation)

Open to Public Inspection

The organization may have to use a copy of this return to satisfy state reporting requirements.

**A** For the 2012 calendar year, or tax year beginning **JUL 1, 2012** and ending **JUN 30, 2013**

|   |  |   |
|---|--|---|
| <b>B</b> Check if applicable:<br><input type="checkbox"/> Address change<br><input type="checkbox"/> Name change<br><input type="checkbox"/> Initial return<br><input type="checkbox"/> Terminated<br><input type="checkbox"/> Amended return<br><input type="checkbox"/> Application pending | <b>C</b> Name of organization<br><b>OPERA NAPLES, INC.</b><br>Doing Business As<br>Number and street (or P.O. box if mail is not delivered to street address) Room/suite<br><b>2408 LINWOOD AVENUE</b><br>City, town, or post office, state, and ZIP code<br><b>NAPLES, FL 34112</b><br><b>F</b> Name and address of principal officer: <b>GERALD GOLDBERG</b><br><b>SAME AS C ABOVE</b> | <b>D</b> Employer identification number<br><b>42-1671038</b><br><b>E</b> Telephone number<br><b>239-963-9050</b><br><b>G</b> Gross receipts \$ <b>1,635,869.</b><br><b>H(a)</b> Is this a group return for affiliates? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No<br><b>H(b)</b> Are all affiliates included? <input type="checkbox"/> Yes <input type="checkbox"/> No<br>If "No," attach a list. (see instructions)<br><b>H(c)</b> Group exemption number ▶ |
| <b>I</b> Tax-exempt status: <input checked="" type="checkbox"/> 501(c)(3) <input type="checkbox"/> 501(c)( ) (insert no.) <input type="checkbox"/> 4947(a)(1) or <input type="checkbox"/> 527   |  |   |
| <b>J</b> Website: ▶ <b>WWW.OPERANAPLES.COM</b>  |  |   |
| <b>K</b> Form of organization: <input checked="" type="checkbox"/> Corporation <input type="checkbox"/> Trust <input type="checkbox"/> Association <input type="checkbox"/> Other ▶   |  |   |
| <b>L</b> Year of formation: <b>2005</b> <b>M</b> State of legal domicile: <b>FL</b>   |  |   |

**Part I Summary**

| <b>Activities &amp; Governance</b>   | <b>1</b> Briefly describe the organization's mission or most significant activities: <b>TO ENRICH THE SOUTHWEST FLORIDA COMMUNITY BY PRESENTING OPERA PERFORMANCES AND EDUCATIONAL PROGRAMS</b><br><b>2</b> Check this box <input type="checkbox"/> if the organization discontinued its operations or disposed of more than 25% of its net assets.<br><b>3</b> Number of voting members of the governing body (Part VI, line 1a) ..... <b>3</b> ..... <b>11</b><br><b>4</b> Number of independent voting members of the governing body (Part VI, line 1b) ..... <b>4</b> ..... <b>11</b><br><b>5</b> Total number of individuals employed in calendar year 2012 (Part V, line 2a) ..... <b>5</b> ..... <b>7</b><br><b>6</b> Total number of volunteers (estimate if necessary) ..... <b>6</b> ..... <b>75</b><br><b>7a</b> Total unrelated business revenue from Part VIII, column (C), line 12 ..... <b>7a</b> ..... <b>34.</b><br><b>7b</b> Net unrelated business taxable income from Form 990-T, line 34 ..... <b>7b</b> ..... <b>0.</b> |   |  |                           |              |  |            |            |   |          |          |   |          |            |  |    |         |  |          |            |  |          |          |   |          |          |  |           |          |
|--|---|---|--|---------------------------|--------------|--|------------|------------|---|----------|----------|---|----------|------------|--|----|---------|--|----------|------------|--|----------|----------|---|----------|----------|--|-----------|----------|
| <b>Revenue</b>   |   | <table border="1" style="width:100%; border-collapse: collapse;"> <tr> <th></th> <th style="text-align: center;">Prior Year</th> <th style="text-align: center;">Current Year</th> </tr> <tr> <td><b>8</b> Contributions and grants (Part VIII, line 1h) .....</td> <td style="text-align: right;">634,363.</td> <td style="text-align: right;">1,076,068.</td> </tr> <tr> <td><b>9</b> Program service revenue (Part VIII, line 2g) .....</td> <td style="text-align: right;">262,290.</td> <td style="text-align: right;">365,328.</td> </tr> <tr> <td><b>10</b> Investment income (Part VIII, column (A), lines 3, 4, and 7d) .....</td> <td style="text-align: right;">32.</td> <td style="text-align: right;">34.</td> </tr> <tr> <td><b>11</b> Other revenue (Part VIII, column (A), lines 5, 6d, 8c, 9c, 10c, and 11e) .....</td> <td style="text-align: right;">0.</td> <td style="text-align: right;">90,900.</td> </tr> <tr> <td><b>12</b> Total revenue - add lines 8 through 11 (must equal Part VIII, column (A), line 12) .....</td> <td style="text-align: right;">896,685.</td> <td style="text-align: right;">1,532,330.</td> </tr> </table>   |  | Prior Year                | Current Year | <b>8</b> Contributions and grants (Part VIII, line 1h) .....                     | 634,363.   | 1,076,068. | <b>9</b> Program service revenue (Part VIII, line 2g) .....                   | 262,290. | 365,328. | <b>10</b> Investment income (Part VIII, column (A), lines 3, 4, and 7d) .....                     | 32.      | 34.        | <b>11</b> Other revenue (Part VIII, column (A), lines 5, 6d, 8c, 9c, 10c, and 11e) ..... | 0. | 90,900. | <b>12</b> Total revenue - add lines 8 through 11 (must equal Part VIII, column (A), line 12) ..... | 896,685. | 1,532,330. |  |          |          |   |          |          |  |           |          |
|  | Prior Year  | Current Year  |  |                           |              |  |            |            |   |          |          |   |          |            |  |    |         |  |          |            |  |          |          |   |          |          |  |           |          |
| <b>8</b> Contributions and grants (Part VIII, line 1h) .....                                       | 634,363.  | 1,076,068.  |  |                           |              |  |            |            |   |          |          |   |          |            |  |    |         |  |          |            |  |          |          |   |          |          |  |           |          |
| <b>9</b> Program service revenue (Part VIII, line 2g) .....  | 262,290.  | 365,328.  |  |                           |              |  |            |            |   |          |          |   |          |            |  |    |         |  |          |            |  |          |          |   |          |          |  |           |          |
| <b>10</b> Investment income (Part VIII, column (A), lines 3, 4, and 7d) .....                      | 32.   | 34.   |  |                           |              |  |            |            |   |          |          |   |          |            |  |    |         |  |          |            |  |          |          |   |          |          |  |           |          |
| <b>11</b> Other revenue (Part VIII, column (A), lines 5, 6d, 8c, 9c, 10c, and 11e) .....           | 0.  | 90,900.   |  |                           |              |  |            |            |   |          |          |   |          |            |  |    |         |  |          |            |  |          |          |   |          |          |  |           |          |
| <b>12</b> Total revenue - add lines 8 through 11 (must equal Part VIII, column (A), line 12) ..... | 896,685.  | 1,532,330.  |  |                           |              |  |            |            |   |          |          |   |          |            |  |    |         |  |          |            |  |          |          |   |          |          |  |           |          |
| <b>Expenses</b>  |   |   |  |                           |              |  |            |            |   |          |          |   |          |            |  |    |         |  |          |            |  |          |          |   |          |          |  |           |          |
|  |   | <table border="1" style="width:100%; border-collapse: collapse;"> <tr> <th></th> <th style="text-align: center;">Prior Year</th> <th style="text-align: center;">Current Year</th> </tr> <tr> <td><b>13</b> Grants and similar amounts paid (Part IX, column (A), lines 1-3) .....</td> <td style="text-align: right;">0.</td> <td style="text-align: right;">0.</td> </tr> <tr> <td><b>14</b> Benefits paid to or for members (Part IX, column (A), line 4) .....</td> <td style="text-align: right;">0.</td> <td style="text-align: right;">0.</td> </tr> <tr> <td><b>15</b> Salaries, other compensation, employee benefits (Part IX, column (A), lines 5-10) .....</td> <td style="text-align: right;">252,221.</td> <td style="text-align: right;">363,839.</td> </tr> <tr> <td><b>16a</b> Professional fundraising fees (Part IX, column (A), line 11e) .....</td> <td style="text-align: right;">0.</td> <td style="text-align: right;">0.</td> </tr> <tr> <td><b>b</b> Total fundraising expenses (Part IX, column (D), line 25) ▶ <b>103,539.</b></td> <td></td> <td></td> </tr> <tr> <td><b>17</b> Other expenses (Part IX, column (A), lines 11a-11d, 11f-24e) .....</td> <td style="text-align: right;">704,567.</td> <td style="text-align: right;">618,686.</td> </tr> <tr> <td><b>18</b> Total expenses. Add lines 13-17 (must equal Part IX, column (A), line 25) .....</td> <td style="text-align: right;">956,788.</td> <td style="text-align: right;">982,525.</td> </tr> <tr> <td><b>19</b> Revenue less expenses. Subtract line 18 from line 12 .....</td> <td style="text-align: right;">&lt;60,103.&gt;</td> <td style="text-align: right;">549,805.</td> </tr> </table> |  | Prior Year                | Current Year | <b>13</b> Grants and similar amounts paid (Part IX, column (A), lines 1-3) ..... | 0.         | 0.         | <b>14</b> Benefits paid to or for members (Part IX, column (A), line 4) ..... | 0.       | 0.       | <b>15</b> Salaries, other compensation, employee benefits (Part IX, column (A), lines 5-10) ..... | 252,221. | 363,839.   | <b>16a</b> Professional fundraising fees (Part IX, column (A), line 11e) .....           | 0. | 0.      | <b>b</b> Total fundraising expenses (Part IX, column (D), line 25) ▶ <b>103,539.</b>               |          |            | <b>17</b> Other expenses (Part IX, column (A), lines 11a-11d, 11f-24e) ..... | 704,567. | 618,686. | <b>18</b> Total expenses. Add lines 13-17 (must equal Part IX, column (A), line 25) ..... | 956,788. | 982,525. | <b>19</b> Revenue less expenses. Subtract line 18 from line 12 ..... | <60,103.> | 549,805. |
|  | Prior Year  | Current Year  |  |                           |              |  |            |            |   |          |          |   |          |            |  |    |         |  |          |            |  |          |          |   |          |          |  |           |          |
| <b>13</b> Grants and similar amounts paid (Part IX, column (A), lines 1-3) .....                   | 0.  | 0.  |  |                           |              |  |            |            |   |          |          |   |          |            |  |    |         |  |          |            |  |          |          |   |          |          |  |           |          |
| <b>14</b> Benefits paid to or for members (Part IX, column (A), line 4) .....                      | 0.  | 0.  |  |                           |              |  |            |            |   |          |          |   |          |            |  |    |         |  |          |            |  |          |          |   |          |          |  |           |          |
| <b>15</b> Salaries, other compensation, employee benefits (Part IX, column (A), lines 5-10) .....  | 252,221.  | 363,839.  |  |                           |              |  |            |            |   |          |          |   |          |            |  |    |         |  |          |            |  |          |          |   |          |          |  |           |          |
| <b>16a</b> Professional fundraising fees (Part IX, column (A), line 11e) .....                     | 0.  | 0.  |  |                           |              |  |            |            |   |          |          |   |          |            |  |    |         |  |          |            |  |          |          |   |          |          |  |           |          |
| <b>b</b> Total fundraising expenses (Part IX, column (D), line 25) ▶ <b>103,539.</b>               |   |   |  |                           |              |  |            |            |   |          |          |   |          |            |  |    |         |  |          |            |  |          |          |   |          |          |  |           |          |
| <b>17</b> Other expenses (Part IX, column (A), lines 11a-11d, 11f-24e) .....                       | 704,567.  | 618,686.  |  |                           |              |  |            |            |   |          |          |   |          |            |  |    |         |  |          |            |  |          |          |   |          |          |  |           |          |
| <b>18</b> Total expenses. Add lines 13-17 (must equal Part IX, column (A), line 25) .....          | 956,788.  | 982,525.  |  |                           |              |  |            |            |   |          |          |   |          |            |  |    |         |  |          |            |  |          |          |   |          |          |  |           |          |
| <b>19</b> Revenue less expenses. Subtract line 18 from line 12 .....                               | <60,103.>   | 549,805.  |  |                           |              |  |            |            |   |          |          |   |          |            |  |    |         |  |          |            |  |          |          |   |          |          |  |           |          |
| <b>Net Assets or Fund Balances</b>   |   | <table border="1" style="width:100%; border-collapse: collapse;"> <tr> <th></th> <th style="text-align: center;">Beginning of Current Year</th> <th style="text-align: center;">End of Year</th> </tr> <tr> <td><b>20</b> Total assets (Part X, line 16) .....</td> <td style="text-align: right;">1,106,358.</td> <td style="text-align: right;">1,677,816.</td> </tr> <tr> <td><b>21</b> Total liabilities (Part X, line 26) .....</td> <td style="text-align: right;">487,818.</td> <td style="text-align: right;">541,641.</td> </tr> <tr> <td><b>22</b> Net assets or fund balances. Subtract line 21 from line 20 .....</td> <td style="text-align: right;">618,540.</td> <td style="text-align: right;">1,136,175.</td> </tr> </table>   |  | Beginning of Current Year | End of Year  | <b>20</b> Total assets (Part X, line 16) .....                                   | 1,106,358. | 1,677,816. | <b>21</b> Total liabilities (Part X, line 26) .....                           | 487,818. | 541,641. | <b>22</b> Net assets or fund balances. Subtract line 21 from line 20 .....                        | 618,540. | 1,136,175. |  |    |         |  |          |            |  |          |          |   |          |          |  |           |          |
|  | Beginning of Current Year   | End of Year   |  |                           |              |  |            |            |   |          |          |   |          |            |  |    |         |  |          |            |  |          |          |   |          |          |  |           |          |
| <b>20</b> Total assets (Part X, line 16) .....   | 1,106,358.  | 1,677,816.  |  |                           |              |  |            |            |   |          |          |   |          |            |  |    |         |  |          |            |  |          |          |   |          |          |  |           |          |
| <b>21</b> Total liabilities (Part X, line 26) .....  | 487,818.  | 541,641.  |  |                           |              |  |            |            |   |          |          |   |          |            |  |    |         |  |          |            |  |          |          |   |          |          |  |           |          |
| <b>22</b> Net assets or fund balances. Subtract line 21 from line 20 .....                         | 618,540.  | 1,136,175.  |  |                           |              |  |            |            |   |          |          |   |          |            |  |    |         |  |          |            |  |          |          |   |          |          |  |           |          |

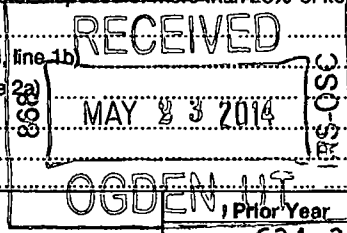
**Part II Signature Block**

Under penalties of perjury, I declare that I have examined this return, including accompanying schedules and statements, and to the best of my knowledge and belief, it is true, correct, and complete. Declaration of preparer (other than officer) is based on all information of which preparer has any knowledge.

|                               |   |              |
|-------------------------------|---|--------------|
| <b>Sign Here</b>              | Signature of officer<br><br><b>GERALD GOLDBERG, CHAIRMAN OF THE BOARD</b><br>Type or print name and title   | Date<br><br> |
| <b>Paid Preparer Use Only</b> | Print/Type preparer's name<br><b>CYNTHIA W. PISANI</b><br>Preparer's signature<br><b>CYNTHIA W. PISANI</b><br>Date<br><b>05/14/14</b><br>Check <input type="checkbox"/> if self-employed<br>PTIN<br><b>P00305070</b><br>Firm's name ▶ <b>HILL, BARTH &amp; KING LLC</b><br>Firm's EIN ▶ <b>34-1897225</b><br>Firm's address ▶ <b>3838 TAMiami TRAIL NORTH</b><br><b>NAPLES, FL 34103</b><br>Phone no. <b>(239) 263-2111</b> |              |

May the IRS discuss this return with the preparer shown above? (see instructions)  Yes  No

SCANNED JUN 23 2014



Form **990**

# Return of Organization Exempt From Income Tax

OMB No 1545-0047

Under section 501(c), 527, or 4947(a)(1) of the Internal Revenue Code (except private foundations)

# 2013

Department of the Treasury  
Internal Revenue Service

Do not enter Social Security numbers on this form as it may be made public.

Information about Form 990 and its instructions is at [www.irs.gov/form990](http://www.irs.gov/form990).

Open to Public Inspection

**A** For the 2013 calendar year, or tax year beginning **JUL 1, 2013** and ending **JUN 30, 2014**

|   |  |   |  |
|---|--|---|--|
| <b>B</b> Check if applicable:<br><input type="checkbox"/> Address change<br><input type="checkbox"/> Name change<br><input type="checkbox"/> Initial return<br><input type="checkbox"/> Terminated<br><input type="checkbox"/> Amended return<br><input type="checkbox"/> Application pending | <b>C</b> Name of organization<br><b>OPERA NAPLES, INC.</b>                 |   | <b>D</b> Employer identification number<br><b>42-1671038</b>   |
|   | Doing Business As  |   | <b>E</b> Telephone number<br><b>239-963-9050</b>   |
|   | Number and street (or P.O. box if mail is not delivered to street address) | Room/suite  | <b>G</b> Gross receipts \$ <b>1,434,898.</b>   |
|   | <b>2408 LINWOOD AVENUE</b>   |   | <b>H(a)</b> Is this a group return for subordinates? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No |
| City or town, state or province, country, and ZIP or foreign postal code<br><b>NAPLES, FL 34112</b>   |  | <b>H(b)</b> Are all subordinates included? <input type="checkbox"/> Yes <input type="checkbox"/> No |  |
| <b>F</b> Name and address of principal officer: <b>CAROL F. SHAW</b><br><b>SAME AS C ABOVE</b>  |  | <b>H(c)</b> Group exemption number <b>▶</b>   |  |
| <b>I</b> Tax-exempt status: <input checked="" type="checkbox"/> 501(c)(3) <input type="checkbox"/> 501(c)( ) (insert no.) <input type="checkbox"/> 4947(a)(1) or <input type="checkbox"/> 527   |  |   |  |
| <b>J</b> Website: <b>▶ WWW.OPERANAPLES.COM</b>  |  |   |  |
| <b>K</b> Form of organization: <input checked="" type="checkbox"/> Corporation <input type="checkbox"/> Trust <input type="checkbox"/> Association <input type="checkbox"/> Other <b>▶</b>  |  | <b>L</b> Year of formation: <b>2005</b> <b>M</b> State of legal domicile: <b>FL</b>                 |  |

## Part I Summary

|   |   |                           |              |
|---|---|---------------------------|--------------|
| Activities & Governance   | <b>1</b> Briefly describe the organization's mission or most significant activities: <b>TO ENRICH THE SOUTHWEST FLORIDA COMMUNITY BY PRESENTING OPERA PERFORMANCES WHICH ENGAGE</b> |                           |              |
|   | <b>2</b> Check this box <input type="checkbox"/> if the organization discontinued its operations or disposed of more than 25% of its net assets.                                    |                           |              |
|   | <b>3</b> Number of voting members of the governing body (Part VI, line 1a)  | <b>3</b>                  | <b>17</b>    |
|   | <b>4</b> Number of independent voting members of the governing body (Part VI, line 1b)  | <b>4</b>                  | <b>17</b>    |
|   | <b>5</b> Total number of individuals employed in calendar year 2013 (Part V, line 2a)   | <b>5</b>                  | <b>8</b>     |
|   | <b>6</b> Total number of volunteers (estimate if necessary)   | <b>6</b>                  | <b>218</b>   |
|   | <b>7 a</b> Total unrelated business revenue from Part VIII, column (C), line 12   | <b>7a</b>                 | <b>8.</b>    |
| <b>b</b> Net unrelated business taxable income from Form 990-T, line 34             | <b>7b</b>   | <b>0.</b>                 |              |
| Revenue   | <b>8</b> Contributions and grants (Part VIII, line 1h)  | Prior Year                | Current Year |
|   | <b>9</b> Program service revenue (Part VIII, line 1g)   | 1,076,068.                | 1,042,286.   |
|   | <b>10</b> Investment income (Part VIII, column (A), lines 3, 4, and 7d)   | 365,328.                  | 199,998.     |
|   | <b>11</b> Other revenue (Part VIII, column (A), lines 5, 6d, 8c, 9c, 10c and 11e)   | 34.                       | 8.           |
|   | <b>12</b> Total revenue - add lines 8 through 11 (must equal Part VIII, column (A), line 12)  | 90,900.                   | 25,961.      |
|   | <b>13</b> Grants and similar amounts paid (Part IX, column (A), lines 1-3)  | 1,532,330.                | 1,268,253.   |
|   | <b>14</b> Benefits paid to or for members (Part IX, column (A), line 4)   | 0.                        | 0.           |
|   | <b>15</b> Salaries, other compensation, employee benefits (Part IX, column (A), lines 5-10)   | 0.                        | 0.           |
|   | <b>16a</b> Professional fundraising fees (Part IX, column (A), line 11e)  | 363,839.                  | 229,138.     |
|   | <b>b</b> Total fundraising expenses (Part IX, column (D), line 25) <b>▶ 54,767.</b>   | 0.                        | 0.           |
| <b>17</b> Other expenses (Part IX, column (A), lines 11a-11d, 11f-24e)              | 618,686.  | 824,186.                  |              |
| <b>18</b> Total expenses. Add lines 13-17 (must equal Part IX, column (A), line 25) | 982,525.  | 1,053,324.                |              |
| <b>19</b> Revenue less expenses Subtract line 18 from line 12                       | 549,805.  | 214,929.                  |              |
| Net Assets or Fund Balances   | <b>20</b> Total assets (Part X, line 16)  | Beginning of Current Year | End of Year  |
|   | <b>21</b> Total liabilities (Part X, line 26)   | 1,677,816.                | 2,248,381.   |
|   | <b>22</b> Net assets or fund balances. Subtract line 21 from line 20  | 541,641.                  | 897,277.     |
|   |   | 1,136,175.                | 1,351,104.   |

## Part II Signature Block

Under penalties of perjury, I declare that I have examined this return, including accompanying schedules and statements, and to the best of my knowledge and belief, it is true, correct, and complete. Declaration of preparer (other than officer) is based on all information of which preparer has any knowledge.

|                  |  |                     |
|------------------|--|---------------------|
| <b>Sign Here</b> | Signature of officer <i>Carol Shaw</i>                                   | Date <b>1-27-15</b> |
|                  | <b>CAROL F. SHAW, EXECUTIVE DIRECTOR</b><br>Type or print name and title |                     |

|                               |   |  |                          |   |                          |
|-------------------------------|---|--|--------------------------|---|--------------------------|
| <b>Paid Preparer Use Only</b> | Print/Type preparer's name<br><b>CYNTHIA W. PISANI</b>                | Preparer's signature<br><b>CYNTHIA W. PISANI</b> | Date<br><b>01/26/15</b>  | Check <input type="checkbox"/> if self-employed | PTIN<br><b>P00305070</b> |
|                               | Firm's name <b>▶ HILL, BARTH &amp; KING LLC</b>                       | Firm's EIN <b>▶ 34-1897225</b>                   | Phone no. (239) 263-2111 |   |                          |
|                               | Firm's address <b>▶ 3838 TAMiami TRAIL NORTH<br/>NAPLES, FL 34103</b> |  |                          |   |                          |

May the IRS discuss this return with the preparer shown above? (see instructions)  Yes  No

917 ✓

**CONTACT**

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