



1 these strategies requires a combined commitment of resources from both the private and public sectors.

2 NOW, THEREFORE, in consideration of the mutual covenants, terms and conditions contained  
3 here, the parties agree as follows:

4 1. OBLIGATIONS OF THE CONTRACTOR

5 CONTRACTOR shall provide COUNTY updates detailing activities toward obligations under  
6 this agreement with a monthly activity report within thirty (30) days after the end of each month.

7 CONTRACTOR shall expend an amount, not to exceed \$80,500.00, to provide the following essential  
8 services as depicted in Exhibit A Scope of Work:

9 A. Performance Based Services:

10 i. CONTRACTOR shall retain PROJECT TEAM, which is depicted in Exhibit A  
11 and Exhibit B Scope of Work.

12 ii. CONTRACTOR and PROJECT TEAM will meet with representatives of each  
13 of the cities in Exhibit A and Exhibit B to identify potential target economic development sites.

14 iii. CONTRACTOR and PROJECT TEAM will prepare inventory of sites.

15 iv. CONTRACTOR and PROJECT TEAM will identify market opportunities and  
16 infrastructure needs for sites.

17 v. CONTRACTOR and PROJECT TEAM will conduct preliminary conceptual  
18 financing plan for funding needed for infrastructure.

19 vi. CONTRACTOR and PROJECT TEAM will outline the following: readiness  
20 and positioning of key sites to target; site maps that can be used for marketing and a business attraction  
21 website; suggested property portfolios to take to market; and discussion of current marketing  
22 enhancements.

23 vii. CONTRACTOR and PROJECT TEAM will prepare a summary report that  
24 includes the profiles of the target sites and the conceptual financing plan. The PROJECT TEAM will  
25 conduct a Go-to-Meeting teleconference to review and present preliminary findings to EDC staff and cities.

26 viii. CONTRACTOR and PROJECT TEAM will conduct a final report and  
27 materials.

28

1           2.     OBLIGATIONS OF THE COUNTY

2           A.     COUNTY shall provide an amount not to exceed \$80,500.00 to CONTRACTOR to  
3 carry out services provided under this Agreement.

4           3.     TERM

5           The term of this Agreement shall commence upon execution of agreement and conclude no later  
6 than June 30, 2019.

7           4.     TERMINATION

8           A.     Non-Allocation of Funds - The terms of this Agreement, and the services to be  
9 provided hereunder, are contingent on the approval of funds by the appropriating government agency.  
10 Should sufficient funds not be allocated, the services provided may be modified, or this Agreement  
11 terminated, at any time by giving CONTRACTOR thirty (30) days advance written notice.

12           B.     Breach of Contract - COUNTY may immediately suspend or terminate this  
13 Agreement in whole or in part, where in the determination of COUNTY there is:

- 14                     1)     An illegal or improper use of funds;  
15                     2)     A failure to comply with any term of this Agreement;  
16                     3)     A substantially incorrect or incomplete report submitted to the COUNTY;  
17                     4)     Improperly performed service.

18           In no event shall any payment by COUNTY constitute a waiver by COUNTY of any breach of this  
19 Agreement or any default which may then exist on the part of CONTRACTOR. Neither shall such payment  
20 impair or prejudice any remedy available to the COUNTY with respect to the breach or default. COUNTY  
21 shall have the right to demand of CONTRACTOR the repayment to COUNTY of any funds disbursed to  
22 CONTRACTOR under this Agreement, which in the judgment of COUNTY were not expended in  
23 accordance with the terms of this Agreement. CONTRACTOR shall promptly refund any such funds upon  
24 demand.

25           C.     Without Cause - Under circumstances other than those set forth above, this  
26 Agreement may be terminated by COUNTY upon the giving of thirty (30) days advance written notice of an  
27 intention to terminate to CONTRACTOR.

28           5.     COMPENSATION/INVOICING: COUNTY agrees to pay CONTRACTOR and

1 CONTRACTOR agrees to receive compensation as follows: monthly compensation, with the maximum  
2 total compensation in an amount not to exceed \$80,500.00 for the term of the Agreement. CONTRACTOR  
3 shall submit monthly invoices electronically to the County of Fresno County Administrative Office with the  
4 monthly activity report required in Section 1 of this Agreement, within thirty (30) days after the end of each  
5 month. COUNTY shall remit payment within forty-five (45) days from date of receipt of invoice and activity  
6 report by the County.

7 In no event shall services performed under this Agreement be in excess of \$80,500.00 during the  
8 term of this Agreement. It is understood that all expenses incidental to CONTRACTOR'S performance of  
9 services under this Agreement shall be borne by CONTRACTOR.

10 6. INDEPENDENT CONTRACTOR: In performance of the work, duties and obligations  
11 assumed by CONTRACTOR under this Agreement, it is mutually understood and agreed that  
12 CONTRACTOR, including any and all of CONTRACTOR'S officers, agents, and employees will at all times  
13 be acting and performing as an independent contractor, and shall act in an independent capacity and not as  
14 an officer, agent, servant, employee, joint venturer, partner, or associate of the COUNTY. Furthermore,  
15 COUNTY shall have no right to control or supervise or direct the manner or method by which  
16 CONTRACTOR shall perform its work and function. However, COUNTY shall retain the right to administer  
17 this Agreement so as to verify that CONTRACTOR is performing its obligations in accordance with the  
18 terms and conditions thereof.

19 CONTRACTOR and COUNTY shall comply with all applicable provisions of law and the rules and  
20 regulations, if any, of governmental authorities having jurisdiction over matters the subject thereof.

21 Because of its status as an independent contractor, CONTRACTOR shall have absolutely no right  
22 to employment rights and benefits available to COUNTY employees. CONTRACTOR shall be solely liable  
23 and responsible for providing to, or on behalf of, its employees all legally-required employee benefits. In  
24 addition, CONTRACTOR shall be solely responsible and save COUNTY harmless from all matters relating  
25 to payment of CONTRACTOR'S employees, including compliance with Social Security withholding and all  
26 other regulations governing such matters. It is acknowledged that during the term of this Agreement,  
27 CONTRACTOR may be providing services to others unrelated to the COUNTY or to this Agreement.

28 7. MODIFICATION: Any matters of this Agreement may be modified from time to time by the

1 written consent of all the parties without, in any way, affecting the remainder.

2 8. NON-ASSIGNMENT: Neither party shall assign, transfer or sub-contract this Agreement  
3 nor their rights or duties under this Agreement without the prior written consent of the other party.

4 9. HOLD HARMLESS: CONTRACTOR agrees to indemnify, save, hold harmless, and at  
5 COUNTY'S request, defend the COUNTY, its officers, agents, and employees from any and all costs and  
6 expenses (including attorney's fees and costs), damages, liabilities, claims, and losses occurring or  
7 resulting to COUNTY in connection with the performance, or failure to perform, by CONTRACTOR, its  
8 officers, agents, or employees under this Agreement, and from any and all costs and expenses (including  
9 attorney's fees and costs), damages, liabilities, claims, and losses occurring or resulting to any person, firm,  
10 or corporation who may be injured or damaged by the performance, or failure to perform, of  
11 CONTRACTOR, its officers, agents, or employees under this Agreement.

12 10. INSURANCE

13 Without limiting COUNTY's right to obtain indemnification from CONTRACTOR or any third parties,  
14 CONTRACTOR, at its sole expense, shall maintain in full force and effect, the following insurance policies  
15 or a program of self-insurance, including but not limited to, an insurance pooling arrangement or Joint  
16 Powers Agreement (JPA) throughout the term of the Agreement:

17 A. Commercial General Liability

18 Commercial General Liability Insurance with limits of not less than Two Million Dollars (\$2,000,000)  
19 per occurrence and an annual aggregate of Four Million Dollars (\$4,000,000). This policy shall be issued on  
20 a per occurrence basis. COUNTY may require specific coverages including completed operations,  
21 products liability, contractual liability, Explosion-Collapse-Underground, fire legal liability, or any other  
22 liability insurance deemed necessary because of the nature of this contract.

23 B. Automobile Liability

24 Comprehensive Automobile Liability Insurance with limits of not less than One Million Dollars  
25 (\$1,000,000.00) per accident for bodily injury and for property damages. Coverage should include any auto  
26 used in connection with this Agreement.

27 C. Professional Liability

28 If CONTRACTOR employs licensed professional staff, (e.g., Ph.D., R.N., L.C.S.W., M.F.C.C.) in

1 providing services, Professional Liability Insurance with limits of not less than One Million Dollars  
2 (\$1,000,000.00) per occurrence, Three Million Dollars (\$3,000,000.00) annual aggregate.

3 D. Worker's Compensation

4 A policy of Worker's Compensation insurance as may be required by the California Labor  
5 Code.

6 CONTRACTOR shall obtain endorsements to the Commercial General Liability insurance naming  
7 the County of Fresno, its officers, agents, and employees, individually and collectively, as additional  
8 insured, but only insofar as the operations under this Agreement are concerned. Such coverage for  
9 additional insured shall apply as primary insurance and any other insurance, or self-insurance, maintained  
10 by COUNTY, its officers, agents and employees shall be excess only and not contributing with insurance  
11 provided under CONTRACTOR's policies herein. This insurance shall not be cancelled or changed without  
12 a minimum of thirty (30) days advance written notice given to COUNTY.

13 Within Thirty (30) days from the date CONTRACTOR signs and executes this Agreement,  
14 CONTRACTOR shall provide certificates of insurance and endorsement as stated above for all of the  
15 foregoing policies, as required herein, to the County of Fresno, County Administrative Officer, 2281 Tulare  
16 Street, Room 304, Fresno, California 93721, stating that such insurance coverage have been obtained and  
17 are in full force; that the County of Fresno, its officers, agents and employees will not be responsible for any  
18 premiums on the policies; that such Commercial General Liability insurance names the County of Fresno,  
19 its officers, agents and employees, individually and collectively, as additional insured, but only insofar as  
20 the operations under this Agreement are concerned; that such coverage for additional insured shall apply  
21 as primary insurance and any other insurance, or self-insurance, maintained by COUNTY, its officers,  
22 agents and employees, shall be excess only and not contributing with insurance provided under  
23 CONTRACTOR's policies herein; and that this insurance shall not be cancelled or changed without a  
24 minimum of thirty (30) days advance, written notice given to COUNTY.

25 In the event CONTRACTOR fails to keep in effect at all times insurance coverage as herein  
26 provided, the COUNTY may, in addition to other remedies it may have, suspend or terminate this  
27 Agreement upon the occurrence of such event.

28 All policies shall be issued by admitted insurers licensed to do business in the State of California,

1 and such insurance shall be purchased from companies possessing a current A.M. Best, Inc. rating of A  
2 FSC VII or better.

3 11. AUDITS AND INSPECTIONS: CONTRACTOR shall at any time during business hours,  
4 and as often as COUNTY may deem necessary, make available to COUNTY for examination all of its  
5 records and data with respect to the matters covered by this Agreement. CONTRACTOR shall, upon  
6 request by COUNTY, permit COUNTY to audit and inspect all of such records and data necessary to  
7 ensure CONTRACTOR'S compliance with the terms of this Agreement.

8 If this Agreement exceeds ten thousand dollars (\$10,000.00), CONTRACTOR shall be subject to  
9 the examination and audit of the California State Auditor for a period of three (3) years after final payment  
10 under contract (Government Code Section 8546.7).

11 12. NOTICES: The persons and their addresses having authority to give and receive notices  
12 under this Agreement include the following:

13 COUNTY

14 COUNTY OF FRESNO  
15 County Administrative Officer  
2281 Tulare Street, Room 304  
Fresno, CA 93721

CONTRACTOR

Economic Development Corporation  
Lee Ann Eager  
906 N Street, Suite 120  
Fresno, CA 93721

16 All notices between COUNTY and CONTRACTOR provided for or permitted under this Agreement  
17 must be in writing and delivered either by personal service, by first-class United States mail, by an overnight  
18 commercial courier service, or by telephonic facsimile transmission. A notice delivered by personal service  
19 is effective upon service to the recipient. A notice delivered by first-class United States mail is effective  
20 three COUNTY business days after deposit in the United States mail, postage prepaid, addressed to the  
21 recipient. A notice delivered by an overnight commercial courier service is effective one COUNTY business  
22 day after deposit with the overnight commercial courier service, delivery fees prepaid, with delivery  
23 instructions given for next day delivery, addressed to the recipient. A notice delivered by telephonic  
24 facsimile is effective when transmission to the recipient is completed (but, if such transmission is completed  
25 outside of COUNTY business hours, then such delivery shall be deemed to be effective at the next  
26 beginning of a COUNTY business day), provided that the sender maintains a machine record of the  
27 completed transmission. For all claims arising out of or related to this Agreement, nothing in this section  
28 establishes, waives, or modifies any claims presentation requirements or procedures provided by law,

1 including but not limited to the Government Claims Act (Division 3.6 of Title 1 of the Government Code,  
2 beginning with section 810).

3 13. GOVERNING LAW: Venue for any action arising out of or related to this Agreement shall  
4 only be in Fresno County, California.

5 The rights and obligations of the parties and all interpretation and performance of this Agreement  
6 shall be governed in all respects by the laws of the State of California.

7 14. DISCLOSURE OF SELF-DEALING TRANSACTIONS

8 This provision is only applicable if CONTRACTOR is operating as a corporation (a for-profit or  
9 non-profit corporation) or if during the term of the agreement, CONTRACTOR changes its status to  
10 operate as a corporation.

11 Members of CONTRACTOR's Board of Directors shall disclose any self-dealing transactions that  
12 they are a party to while CONTRACTOR is providing goods or performing services under this  
13 Agreement. A self-dealing transaction shall mean a transaction to which CONTRACTOR is a party and  
14 in which one or more of its directors has a material financial interest. Members of the Board of Directors  
15 shall disclose any self-dealing transactions that they are a party to by completing and signing a Self-  
16 Dealing Transaction Disclosure Form, attached as Exhibit A and incorporated by reference, and  
17 submitting it to the COUNTY prior to commencing with the self-dealing transaction or immediately  
18 thereafter.

19 15. ENTIRE AGREEMENT: This Agreement constitutes the entire agreement between  
20 CONTRACTOR and COUNTY with respect to the subject matter hereof and supersedes all previous  
21 Agreement negotiations, proposals, commitments, writings, advertisements, publications, and  
22 understanding of any nature whatsoever unless expressly included in this Agreement.

23  
24  
25 IN WITNESS WHEREOF, the parties hereto have executed this Agreement as of the day and year  
26 first hereinabove written.

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**CONTRACTOR**

**COUNTY OF FRESNO**

*Lee Ann Eagen*  
(Authorized Signature)

*Sal Quintero*  
Sal Quintero, Chairperson of the Board of Supervisors of the County of Fresno

LEE ANN EAGEN PRESIDENT / CEO  
Print Name & Title

Economic Development Corp.  
906 N Street, Suite 120, Fresno, CA  
93721

Mailing Address

**ATTEST:**  
Bernice E. Seidel  
Clerk of the Board of Supervisors  
County of Fresno, State of California

By: *Susan Bishop*  
Deputy

**FOR ACCOUNTING USE ONLY:**

ORG No.: 0110  
Account No.: 7295  
Requisition No.:

# Marketing Vision

Team Approach

Strategic Planning



# Resources Creative

Effective Targeting

Competitive Communities

**Scope of Work**

**Fresno EDC**

**Opportunity Analysis**

**South Hwy 99 Corridor**

**City of Sanger**

**East Highway 180**

Submitted by  
 Audrey Taylor, Chabin Concepts, Inc.  
 Don Schjeldahl, DSG Advisors  
 Debbie Kern, Keyser Marston Associates

May 1, 2018

# Tactics Solutions

data organization strategies economic development experts

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# Action Facilitation

lead management GIS systems Site selection

# South Hwy 99, Sanger & Squaw Valley Opportunity Analysis

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- I. Project Understanding ..... 1
  - Project Approach – Hwy 99 & Sanger..... 2
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- III. Costs ..... 7
- IV. Timeline..... 7

# South Hwy 99, Sanger & Squaw Valley Opportunity Analysis

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## I. Project Understanding

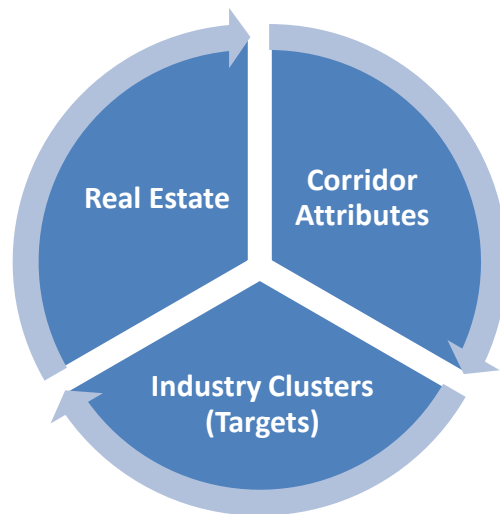
The project goal is to work with communities along the South Hwy 99 corridor and property in City of Sanger to identify specific properties that have development opportunity, analyze, prioritize and prepare as “shovel-ready” to begin marketing those sites to target industries.

Because the portfolio of sites along Hwy 99 will include industrial, commercial, office and possibly retail, engagement with each community will be critical to the outcome. Some communities may have sites in the area that best fit an industrial cluster, where others might have all the amenities to support commercial/office/retail. Continual engagement with the cities will be important to accurately establish potential opportunities and best fit targets.

The outcome of the project will be identified sites that can serve as catalyst projects that will promote Fresno County as a distinctive and desirable region.

The framework revolves around bringing into line three key elements: Real Estate, Corridor Attributes and Industry Clusters.

This framework will guide identification with each city’s geographic areas and specific properties in each city that hold the greatest potential for economic shifting investments. Also, the framework will guide an order of magnitude estimate of financing capacity for Enhanced Infrastructure Financing District.



# South Hwy 99, Sanger & Squaw Valley Opportunity Analysis

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## Project Approach – Hwy 99 & Sanger

We propose a corporate site search approach that provides an efficient method for screening properties along the corridor and quickly narrowing the search to viable candidates. Our corporate site selector team will engage each community at the local level to review each site as if this was a site selection decision for each of the cluster targets.

This approach will not only produce one-two candidate properties in each community, but also valuable insights on local property and community challenges & opportunities.

The primary Team for this evaluation will be Don Schjeldahl, Don Schjeldahl Group (DSG) Advisors and Debbie Kern, Keyser Marston Associates (KMA).

### **1. Team will meet with EDC and representatives of each of the Hwy 99 five cities and Sanger to identify potential target economic development sites**

- Team will schedule on-site meeting and area review, estimate 2-3 days.
- Team will have an initial kickoff meeting with EDC to review EDC's economic cluster analysis, target industries, existing sectors and value-add propositions. Also, the team will review existing marketing, recruitment and business programs.
- EDC will provide background on each of the cities, their strengths and weakness as it relates to marketing as part of the region. The EDC will ask each city to identify 2-4 top priority sites they would like to have reviewed and collect data on each of those sites. The cities will be asked to assemble a list of properties that can meet three basic criteria: *size sufficient to support catalyst project; ownership is supportive of new development; and site is well-located for industrial, office, or commercial use.* The following items will be requested:
  - City map showing the location of sites
  - Parcel maps and aerial photos of each site
  - Property address and assessor parcel number
  - Utility services to each site
  - Environmental status; if known
  - Zoning
  - Transportation overview including road serving property, traffic counts if available

# South Hwy 99, Sanger & Squaw Valley

## Opportunity Analysis

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- The EDC will be asked to provide a contact list of city staff, utilities and other key contacts for interviews and help gather all information prior to on-site tour. A conference call work session will be conducted to fully understanding information provided and identify missing data or documentation.
- The team will also look at each city holistically and within a regional context to help guide the selection of finalist opportunity sites and associated catalyst investments.

### 2. *Team will prepare inventory of sites*

To assess attributes of each city, the corridor and Sanger, the next step will include tours and meetings with each City relative to sites within their area led by project partner DSG Advisors (corporate site selector). The purpose of these meetings is to discover further development information about infrastructure, utilities, labor, transportation, entitlements and market access. We will also seek to understand other geographic areas that are planned for future commercial and industrial development.

Drawing upon our experience and expertise, the physical assets of the area will be viewed through the lens of a corporate occupier as well as a developer, entrepreneur, etc. We also have a proclivity to evaluate land assets based on best practices in sustainability, creative re-use, highest and best use, industry trends, urban versus suburban dynamics, all of which will be included in the inventory of opportunity sites.

As we move through the project, Team will post interim findings on Basecamp, an internal shared document website and management software tool.

Team will categorize sites based on location and potential development opportunities.

#### **Micro-Level Considerations:**

- Site size and configuration based on building type and size, site layout including vehicle circulation, on site storage, vehicle staging, employee parking and other facility needs;
- Utility requirements including water, waste water, natural gas and/or other energy fuels, electric power needs including connected load, kWh usage, time of day, day of week and month of year usage;
- Workforce characteristics including wages, quality of life expectations, number of employees, seasonal employment patterns;
- Operating schedule, days per week, hours per day;
- Transportation needs including inbound/outbound, types of vehicles;
- Environmental — air emissions, storm water, carbon footprint, solid waste disposal;
- Sustainability and green community considerations;
- Development incentives; and
- Competing locations for projects from this cluster.

# South Hwy 99, Sanger & Squaw Valley

## Opportunity Analysis

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### **3. Team will identify market opportunities and infrastructure needs for sites (two sites per community):**

Each site will be aligned with the opportunities relative to findings of EDC's economic cluster analysis, each city's objectives, and property owner's objectives.

Using this information, the team will prepare a profile of each site.

### **4. Preliminary conceptual financing plan for funding needed Infrastructure**

Given the interest local jurisdictions expressed in Enhanced Infrastructure Financing Districts (EIFDs) as a tax increment financing tool, project team partner KMA will provide an order of magnitude estimate of the financing capacity of an EIFD for six target sites (one in each jurisdiction).

The analysis will be based on revenue-generating factors developed by previous analyses undertaken by KMA for different types of industrial, office, and R&D, and residential use in Fresno. KMA will apply the findings of those analyses to the target sites to provide an order of magnitude range of infrastructure costs that could potentially be funded by tax increment generated by each site if it were deposited into an EIFD. The analysis will assume that the County and sponsoring jurisdiction will both participate in the EIFD.

### **5. Market and promotion**

Throughout the project, the team would be documenting:

- Outline of readiness and positioning of key sites to targets;
- Site maps that can be used for marketing and for a business attraction website;
- Suggested property portfolio to take to market; and
- Discussion of current marketing enhancement.

### **6. Summary Report**

Team will prepare a summary report that includes the profiles of the target sites and the conceptual financing plan. Team will meet conduct a Go-to-Meeting teleconference to review and present preliminary findings to EDC staff and cities.

### **7. Final Report and Material**

After preliminary review, Team will make any edits or revisions and deliver electronic and hard copies of reports and materials.

# South Hwy 99, Sanger & Squaw Valley Opportunity Analysis

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## II. Project Understanding – Highway 180 Squaw Valley

In addition to the Opportunity Analysis of commercial and industrial sites along the Corridor and in Sanger, the project would also evaluate premier areas along the Highway 180 East corridor to identify opportunities for development in the tourism industry, specifically hospitality including restaurant, hotel services, and other commercial opportunities serving tourists. There are no particular properties identified, just general areas such as, Highway 180 and Reed Avenue and Squaw Valley, primarily before reaching the Kings Canyon National Park. The intent would be to create a market analysis that could serve as an attraction tool for hotels and restaurants.

### Project Approach – East Highway 180

East Highway 180 is a different market than the Corridor/Sanger and requires a different approach. The goal for this analysis is identify potential for visitor development and capturing visitor sales to grow the economy.

The primary Team for this evaluation, analysis and strategy will be Audrey Taylor, Chabin, and Mary Bosch, Marketek.

#### **1. Team will prepare market analysis**

Prior to an on-site assessment trip, the Team will do research on data to begin determining market and market size. Data to consider will include current number of visitors that go to the Park, auto trips, size of market, average incomes, visitor profile and current sales and leakage.

#### **2. Team On-Site Assessment**

The Team will conduct a 2+ day site visit to evaluate first-hand, assets that will attract visitors, including meeting with individuals and groups. The assessment will evaluate community entrances and wayfinding, identifying key assets currently on a visitor list, public services, local economy and retail, tourism infrastructure, recreation and culture, information centers and linkages to the park.

The assessment will be documented with photos to help identify where opportunities are to create a tourism market:

# South Hwy 99, Sanger & Squaw Valley Opportunity Analysis

Assets	Challenges	Gaps	Opportunities
Landscaping Infrastructure Streets Traffic Flow: <ul style="list-style-type: none"> <li>• Parking</li> <li>• Pedestrian facilities</li> <li>• Utilities</li> <li>• Area trends for recreation</li> </ul> Historic Preservation: <ul style="list-style-type: none"> <li>• Chamber of Commerce</li> <li>• Community pride</li> <li>• Volunteers</li> <li>• Community activities</li> <li>• Historic buildings</li> </ul>	Vacant buildings Stable, trained workforce Planning: <ul style="list-style-type: none"> <li>• Unifying design</li> </ul> Investment Other	Lodging Restaurants Draw off the highway Diversity Signage Marketing Sense of place	Vision Planning and revitalization efforts <ul style="list-style-type: none"> <li>• Business development</li> <li>• Land and development</li> </ul> Support by market potential

### 3. Evaluate Development Options and Potential

With the research and assessment, the Team will provide high-level assessment of development product, what is needed for success and how Squaw Valley fares/competes or is positioned for success.

Team will research other “base camp” communities for recreation and visitors in national parks. Sites and buildings will be identified that may have potential for certain developments that draw visitors off of Hwy 180 and that encourage visitors to stay longer before traveling to the Park.

### 4. Action Plan

Team will create an action plan for moving forward on opportunities including low hanging fruit, such as, signage and marketing key assets, and longer term, larger scale projects with project phases and gameplan.

# South Hwy 99, Sanger & Squaw Valley Opportunity Analysis

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## III. Costs

1. **Opportunity Analysis Hwy 99 Corridor** – would be a fixed fee of \$30,000, not including travel.
2. **Opportunity Analysis City of Sanger** – would be fixed fee of \$7,500 and would be scheduled to leverage Hwy 99 Corridor Analysis and time on site.
3. **Opportunity Analysis East Highway 180** – would be a fixed fee of \$20,000 including travel.

## IV. Timeline

Team estimates completing the work in a three-month timeframe, dependent on availability of city staff and meeting schedules. Team is prepared to begin project June 2018.

# South Hwy 99, Sanger & Squaw Valley Opportunity Analysis

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## Chabin Concepts (Chabin)



Audrey Taylor  
President, Chabin Concepts, Inc.  
Co-chair Marketing, TEAMCALIFORNIA  
[Audrey@chabinconcepts.com](mailto:Audrey@chabinconcepts.com)  
530-345-0364 x27  
Economic Development & Marketing Firm

**Experience:** Economic Development Strategies & Execution Plans  
and Tools

Since 1989, Audrey has led Chabin Concepts to be one of the leading full-service economic development and marketing firms in the nation. Success has been built on her philosophy of collaboration and bringing each client the best expertise and experience available.

Not only has she assisted communities, regions and states across the nation with strategic planning, she has successfully prepared over \$60 million in grant applications for clients and private companies for strategic initiatives, including the first used cooking oil small-scale biodiesel plant. More recently she has assisted California businesses received over \$2.5 million in California Tax Credits, a competitive process.

Chabin's portfolio of work is diverse including assisting communities in locating and expanding companies to entrepreneurial development program. Audrey was a founding member with Don Schjeldahl of the Competitive Ready, community assessment program.

Audrey is a frequent speaker and instructor on the subject of economic development marketing and community readiness. She has authored "*So You Want to Be on a Site Selector's Short List*" and co-authored economic development guides with Maury Forman, Washington State. She was best described upon receiving CALED's prestigious *Golden Bear Award* "for her vision, drive, enthusiasm, creativity, and commitment to the economic development profession."

### ***Relevant Experience (2016-17)***

- *Economic Development Consultant* to the City of Benicia, preparation of the Business Development Action Plan (BDAP), Benicia Industrial Market Study with Keyser-Marston; and implementation actions of the plan supporting staff.
- *Economic Development Strategies*: Solano County, CA; Novato, CA; Stephenville, TX; County of Merced (CEDs); County of San Joaquin (CEDs); Lake Havasu, AZ; Garden City, KS;
- *Economic Development Site Assessments*: Solano County, CA; Grand Junction, CO; Medford, OR; Garden City, KS; Stephenville, TX; Merced County, CA; Chula Vista, CA; Stanfield, OR
- *Economic Development implementation Services*: Grand Junction, CO; City of Chico, CA; City of Merced, CA; City of Benicia, CA.
- *Marketing Strategies*: Yuba City, CA; Clear Creek, CO; Benicia, CA; Shasta County, CA.
- *Workforce Development Strategies*: Northern California (NoRTEC); North Far North- Community Colleges.
- *CalCompete Applications for Private Companies*: Over \$15million in awards.

# South Hwy 99, Sanger & Squaw Valley Opportunity Analysis

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## Don Schjeldahl Group (DSG)



Don Schjeldahl  
President, The Don Schjeldahl Group  
[Don@DonSchjeldahlGroup.com](mailto:Don@DonSchjeldahlGroup.com)  
828-772-9374  
Corporate Site Selection Consultant

**Experience:** Conducted over 300 Corporate Location Assignments.  
Founder of Competitive Ready communities program and site certification programs.

### **Professional Information:**

Don Schjeldahl is founder and principal at DSG Advisors. DSG is a consulting platform that harnesses expertise in corporate location selection and economic development best practices. With more than 35 years' experience in corporate consulting, Don is a leading expert in corporate location strategy and community/property selection for manufacturing, distribution, and specialized industrial facilities.

### **Professional History:**

In his 28 years at The Austin Company, Don led or directed more than 300 location strategy assignments for manufacturing plants, distribution centers, aviation facilities, research and development centers, newspaper plants, broadcast studios and information processing centers. Don has worked in urban centers and rural areas throughout the United States, Canada, Mexico, United Kingdom and Europe.

While at Austin, Don led the location selection team for food processing, soft drink, bottled water and brewing clients. In this role Don worked with Sierra Nevada Brewing, in total for nearly three years. Don helped the company find the best location for an eastern U.S. brewery. Mills River, North Carolina, located 12 miles south of Asheville, was selected as the location for the \$150 million facility. In August 2013 Mr. Schjeldahl concluded his assignment with Sierra Nevada after helping the company initiate the Mills River project and to advance Sierra Nevada's programs for sustainability, energy efficiency and renewable energy that are well established at their Chico, California brewery.

### **Publications:**

Don is a frequent presenter at professional meetings and a contributor to industry-specific publications and location selection journals including Area Development, Business Facilities, Site Selection, and Solar Industry.

### **Activities and Achievements:**

Don is a co-founder of the Site Selectors Guild ([www.SiteSelectorsGuild.com](http://www.SiteSelectorsGuild.com)) and Competitive Ready consulting consortium ([www.competitiveready.com](http://www.competitiveready.com)).

# South Hwy 99, Sanger & Squaw Valley Opportunity Analysis

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## Keyser Marston Associates (KMA)



Debbie Kern  
Managing Principal  
Keyser Marston Associates, Inc.  
[dkern@keysermarston.com](mailto:dkern@keysermarston.com)  
(415) 398-3050  
160 Pacific Avenue, Suite 204  
San Francisco, CA 94111

### **Experience:**

Identify funding sources for needed infrastructure improvements. Debbie Kern is the Managing Principal of Keyser Marston Associates' San Francisco office, with over 30 years of experience in public / private real estate consulting. Keyser Marston Associates, Inc. (KMA) is a boutique real estate advisory firm, with offices in San Francisco, Los Angeles and San Diego, that specializes in:

- Structuring affordable housing financing and implementation transactions;
- Public financing plans for infrastructure and facilities;
- Fiscal analysis and municipal services financing to ensure new development generates sufficient reserves to fund needed services;
- Nexus analysis that supports the link between new development and funding of affordable housing, childcare, parks/open space, and the arts; and
- Traditional real estate market and financial feasibility pro forma analysis that supports deal structuring and asset management.

### **Infrastructure and Public Facility Finance Experience**

Debbie is a leader in the field of infrastructure finance. She has developed effective financing plans for specific new real estate developments, citywide capital improvement plans, and specific plans. Structures are often comprised of multiple layers of sources, including: Infrastructure Financing Districts (IFDs), Community Facility Districts (CFDs), value-added entitlements, new market tax credits, impact fees, and P3s. She has unique experience establishing IFDs having prepared the financing plan for the Rincon Hill IFD. She is now preparing enhanced IFDs (EIFD) for five other jurisdictions in California.

### **Professional Credentials**

Debbie holds a master's degree in economics from Columbia University and a bachelor's degree in economics from University of California, Berkeley and a member of the Phi Beta Kappa honor society.

# South Hwy 99, Sanger & Squaw Valley Opportunity Analysis

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## Marketek, Inc. (Marketek)



Mary Bosch  
Principal  
Marketek, Inc.  
[mary@marketekinc.com](mailto:mary@marketekinc.com)  
(503) 636-1659  
9220 SW Barbur Blvd.  
Portland, OR 97219

### **Experience:**

Mary is a market analyst experienced with every facet of the business development process – from the perspective of the entrepreneur to the developer and the economic development professional. Her core skills include:

- market feasibility analysis,
- strategic planning, consumer research,
- retail analysis,
- neighborhood analysis/business development,
- economic development strategies,
- commercial assessments/ site analysis,
- surveys & focus groups,
- comparative benchmarking, and
- marketing and business planning.

Through her work on economic revitalization projects throughout the nation, Mary has acquired a strong understanding of what it takes to rebuild a community's retail and economic base.

Since beginning her consulting career over 32 years ago, Mary has completed market research, business development and management projects for a wide range of public, nonprofit and private clients. In the downtown/neighborhood development arena, Mary has conducted assignments for well over 160 communities in 15 states on various aspects of economic development including retail market analysis, business retention and recruitment, business district plans, niche marketing and cluster planning. Mary has led over 50 trainings and workshops on Market Analysis, Business Recruitment/Retention and Business Plans for Business Districts for local and state Main Street organizations.

### **Professional Credentials:**

Master of City Planning, Georgia Tech;

B.A., Indiana University

# District 1 - Opportunity Analysis, Incorporated Cities & Transportation Corridors

This scope of service, Opportunity Analysis, is for the incorporated cities of Kerman, Firebaugh, Mendota and San Joaquin and their transportation corridors of Hwy 33 and 180 in Supervisor Pacheco's District 1. This work will be aligned with the Corridor Hwy 99 Opportunity Analysis being conducted for the five cities and Sanger specifically to identify areas of opportunity and shared-resources for infrastructure financing.

Community evaluation and opportunity analysis for potential development sites typically consist of a four-step process. For District 1 the actual process will vary depending on the community, their specific needs and opportunities. There are synergies between these communities particularly around the transportation corridors which will be analyzed as well as reviews of key economic markets industrial, retail, professional and visitor, and key areas such as downtowns, agricultural zones and the transportation corridors.

The information below discusses each step and the important considerations to be addressed under each step. For this scope the team will look at all opportunities that may be viable for each community and how the shared attributes of the communities and their proximity can be linked and leveraged to create broader opportunities and economic impact.

## Step 1: Desktop Review

Prior to actual interviews with City Manager and Key Stakeholders, Step 2, the Team will conduct a "desktop review" which is the typical first step of a business location evaluation. This review will include information already provide by the Fresno EDC, additional research of city and regional websites for key information and deeper information/data from Team Resources. Note: DSG has previous assessed two of the communities for corporate locations. This review will be supported through calls with Fresno EDC and others they refer us to. This provides the Team with baseline for future analysis and on-site visits. Items to be reviewed at this time if available include:

- Maps – Aerial, general plan, zoning, transportation routes-traffic-investment plans, utility, situational, regional context illustrating the location and boundaries, incorporated areas and urban growth boundaries, as well as other important aspects of the community.
- Development and General Plans – Details related to the community's plans for development at the site area such as roadway and utility improvements along with any other pertinent information.
- Workforce – data on demographics and available skilled and unskilled workforce, special programs, commute patterns.

The goal is to have a high-level understanding of the communities and areas/properties that may give the community the most potential for attracting new business investment based on the information provided. These will be further vetted in Step 2.

## Step 2: Interview City Manager and Key Stakeholder

The Team will conduct interview calls with the City Manager of each community and other key stakeholders to further review their goals and priorities, capital plans, current economic centers, patterns and opportunities they view as short-term and long-term. Also review "What will keep us from getting there?" - critical issues/challenges to moving forward any opportunity. During these calls the on-site visit will be finalized. These calls will help to focus the community on the most promising sites/areas and opportunities.

# District 1 - Opportunity Analysis, Incorporated Cities & Transportation Corridors

## Step 3: Site Visit

With the information gathered in Step 1 and Step 2, the Team will be well prepared for the on-site visit and dig deeper into specifics around the opportunity sites and economic drivers the community might be best suited to attract. The Team will review with the Community Team those factors that may be most important to the community and the opportunities they have:

- Site Selection & Best Practices – Discussion with the community about the importance of site readiness and the process that site selection consultants go through in evaluating properties as well as best practices in moving forward economic development projects for any economic market opportunity.
- Meetings with key service providers – chambers of commerce, visitor bureau, ag departments, farm bureau, workforce.
- Meetings with utility providers – Discuss service to each property and any changes or planned improvements that would impact service at the site.
- Meetings with local officials – Discussions about zoning, permitting, annexation plans and other development topics as necessary.
- Next Steps – Discuss needs and resources which will assist making recommendations.

## Step 4: Report & Action Plan

Team will prepare a report of findings, recommendations and action plan. The report will include strengths and weaknesses of opportunity sites (those identified) and an action plan recommending next steps for improving sites/area for development. If buildings are identified, the review will strive to identify issues or limitations of the building that could be addressed and its competitiveness in the current market. The report will include a ranking of each opportunity site based on the long-term potential for investment. Sites will be provided to KMA to review for potential EFDI financing leveraging the Hwy 99 Corridor – Sanger analysis.

## Chabin – DSG Team (Affiliate Firms)

- Audrey Taylor, President, Chabin Concepts – Economic development, economic driver strategic initiatives – traded sectors, visitor potential and population driven.
- Don Schjeldah, President, DSG – Site location consultant, strategic advisor to corporate location decision, assignment-based advisor for opportunity analysis with Chabin Concepts.
- Debbie Kern, KMA – Real Estate and infrastructure financing analysis, EFID preparation.

## Cost of Services

Estimated cost of services is \$5000 per community and \$3,000 allocated for reimbursable expenses such as travel. Cost not to exceed \$23,000.



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**CONTRACTOR**

**COUNTY OF FRESNO**

*Lee Ann Eagen*  
(Authorized Signature)

*Sal Quintero*  
Sal Quintero, Chairperson of the Board of Supervisors of the County of Fresno

LEE ANN EAGEN PRESIDENT / CEO  
Print Name & Title

Economic Development Corp.  
906 N Street, Suite 120, Fresno, CA  
93721

Mailing Address

**ATTEST:**  
Bernice E. Seidel  
Clerk of the Board of Supervisors  
County of Fresno, State of California

By: *Susan Bishop*  
Deputy

**FOR ACCOUNTING USE ONLY:**

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Account No.: 7295  
Requisition No.: