

# Rancho Mission Viejo Riding Park at San Juan Capistrano

---

## Request for Qualifications & Proposals

April 2019



# Rancho Mission Viejo Riding Park

## At San Juan Capistrano • California

# Request for Qualifications & Proposals

The City of San Juan Capistrano (“City”) is soliciting proposals from qualified parties to manage and operate the Rancho Mission Viejo Riding Park at San Juan Capistrano (“Riding Park”). The Riding Park is located on an approximately 65-acre property (“Site”) owned by the City with a long history of hosting world class equestrian events, community and sporting events, and the annual Rancho Mission Viejo Rodeo.

Through this Request for Qualifications & Proposals (“RFQ/P”) the City seeks to identify an experienced management partner to operate the Riding Park. The City will consider proposals for a variety of equestrian or equestrian-related uses at the Riding Park.

The City purchased the land in 2010, and owns the property in fee subject to certain deed restrictions as further described herein. The City will consider conveyance of site and operational control through a lease, management agreement, or license to a qualified entity.

The City of San Juan Capistrano is home to approximately 37,500 people in an idyllic suburban setting. The City is located equidistant between the cities of Los Angeles and San Diego, lies west of Riverside County, southwest of San Bernardino County, and there are approximately 4.9 million people within a 60-minute drive of the Riding Park.

Full details of the opportunity presented, information on the City and region, the selection process, and information to be included in requested responses follows.

Responses are due to the San Juan Capistrano City Clerk on or before 4:00 pm on Thursday, May 23, 2019.



---

# Table of Contents

I.	Overview .....	4	IX.	Qualifications & Proposal Package .....	27
II.	Riding Park .....	6		Relevant Experience .....	27
III.	Area & Market Information .....	9		Transaction & Financial Data .....	27
IV.	Site Utilities .....	14		Project Approach .....	27
V.	Permitted Uses .....	15		References .....	27
VI.	Transaction Structure .....	21		Legal Actions .....	27
VII.	Other .....	22		Other .....	28
VIII.	Selection Process & Timeline .....	23		Qualifications Package Checklist .....	28
	1. Voluntary Orientation & Site Tour – April 17, 2019 .....	23	X.	Evaluation Criteria .....	29
	2. Qualifications & Proposal Package – May 23, 2019 .....	23	XI.	Additional Information & Resources .....	30
	3. Proposer Presentations – Early June 2019 .....	23		City's Contact .....	30
	4. Public Presentations – Late June 2019 .....	23		FTP Site .....	30
	5. Letter of Intent – Early July 2019 .....	23			
	6. Selection of Preferred Candidate – July 2019 .....	23			
	7. Exclusive Negotiation – After Selection .....	24			
	General Process Guidelines .....	25			
	Process Integrity Guidelines .....	26			

Additional documents, information, and materials are available for download to invited parties.

For access, please submit a request to [wsoholt@kosmont.com](mailto:wsoholt@kosmont.com)

There will be a voluntary / optional orientation and Site tour at 1:00 pm on Wednesday, April 17, 2019. Interested parties should be at City Hall (32400 Paseo Adelanto, San Juan Capistrano, CA 92675) by 1:00 pm.

---

# I. Overview

## Background

The Riding Park was originally established in 1996 by Joan Irvine Smith on land licensed from Rancho Mission Viejo, a large private land owner and development company. In 1999, Mrs. Smith and an adjacent property owner, R.J. Brandes formed a partnership to continue managing and improving the Riding Park. The Riding Park quickly earned its reputation as a world class equestrian facility.

In 2000, the Riding Park became the first west coast site to host the Olympic equestrian trials. The Riding Park also hosted the 2004 Olympic equestrian trials, and regularly hosts multiple horse shows, soccer tournaments, and the annual Rancho Mission Viejo Rodeo.

In 2008, Mrs. Smith and Mr. Brandes agreed to dissolve their partnership, and Mr. Brandes continued management of the Riding Park. In 2008, Blenheim Facility Management (“BFM”) was formed to continue operations of the Riding Park under a license from Rancho Mission Viejo (“RMV”).

In 2008, San Juan Capistrano voters approved a measure that authorized the issuance of bonds to acquire and improve land, to preserve it as open space, and to provide recreational amenities, including equestrian facilities, parks and sports fields. In January 2010, the City issued \$30 million in General Obligation Bonds, of which \$27.5 million was used to purchase approximately 132 acres of land inclusive of the Site.

Concurrent with the City’s acquisition of the Riding Park, the City entered into a license agreement with BFM to continue operations at the Site and, since 2014, BFM has been retained by the City to manage the Riding Park under successive management agreements. The current management agreement between BFM and the City is effective through August 1, 2019.

The bonds originally utilized to purchase the Site were a tax-exempt issuance and, as a result, precluded certain agreement structures between BFM and the City. In 2017, the City issued taxable bonds that were used to defease the previously issued tax exempt bonds. As of August 1, 2019, the City will have the ability to enter into agreements for the Riding Park with greater flexibility than was previously allowed.

Through this RFQ/P process, the City desires to identify an experienced party to manage and operate the Riding Park under a lease, management agreement, or a license. The City desires that the selected party will:

- Maintain the Riding Park’s focus as an equestrian facility
- Optimize the community’s use of the Site, including for non-equestrian events
- Maximize City revenues in consideration of the City’s investment in the Site

## Request for Qualifications

Interested parties must submit qualification / proposal packages to the City by 4:00 pm on Thursday, May 23, 2019. Full details of information to be included in the package can be found in Section IX Qualifications & Proposal Package on page 27.

## Location Summary

San Juan Capistrano is located in Southern California, approximately 60 miles southeast of Los Angeles, and approximately 65 miles northwest of San Diego. It is within southern Orange County, and adjacent to the Cities of Dana Point, Laguna Niguel, Mission Viejo, and San Clemente. A regional map follows in Figure 1 below.

Figure 1: Regional Map & Site Location



## Demographic Summary

The City is home to an educated and skilled pool of high-income households with discretionary income drawn by a tranquil suburban environment, proximity to the beach, and dedication to recreation and community vitality. Approximately 4.9 million people live within a 60-minute drive of the Riding Park.

	Population	Average Income
15-Minute Drive	220,000	\$150,200
30-Minute Drive	970,000	142,200
60-Minute Drive	4,930,000	112,900

## Conveyance Terms

The City intends to provide site control through a lease, management agreement, or license. The City may consider terms with a range from five to 20 years, with longer durations granted commensurate with the level of investment proposed, prior operational experience, and strength of reinvestment provisions. The City may also consider investing in infrastructure improvements at the Riding Park given sufficient potential for a return on investment.

## II. Riding Park

The Riding Park encompasses approximately 65-acres of land at the eastern edge of the City. The Riding Park is currently configured with a number of show rings, open fields, and a large parking lot. There are currently no buildings on the Site that would be considered permanent. An aerial of the Site is provided in Figure 2 below, and an interactive aerial and numerous photographs taken during operations can be accessed at the following link: [Google Maps - RMVRP](#).

### Site Amenities

**Rings / Arenas / Fields** – There are a number of rings / arenas and fields on the Site. A summary list follows in Table 1 below, and a map illustrating the location of each is provided in Figure 3 on page 8.

Table 1: List of Riding Park Amenities & Approximate Dimensions

Amenity	Approximate Dimensions	Approximate Square Footage
Pony Ring	219 x125	27,375
Lunging Ring	178 x116	20,648
Lunging Ring 2	210 x 129	27,090
Hunter 1 Arena	312 x 141	43,992
Hunter 2 Arena	298 x 149	44,402
Hunter 3 Arena	271 x 126	34,146
Olympic Ring	188 X 420	78,960
Grass Grand Prix Field	243 X 426	103,518
Grass Pacific Field	247 X 346	89,908
Grass Ortega Field	219 X 348	76,212
Grass Derby Field	345 X 415	143,175

**Stalls** – There are a number of temporary stalls that are erected on the Site for use during horse shows. These stalls are not owned by the City.

### Current Uses

The Riding Park is currently used primarily for horse shows, soccer games / tournaments, and the annual Rancho Mission Viejo Rodeo. Ancillary uses include car shows, weddings, and various other community and private events. Historically, BFM has also hosted approximately six “community events” throughout the year such as outdoor movies in the park and a pumpkin patch.

**Equestrian Uses** – Horse shows and events at the Riding Park have been operated by four primary groups – Blenheim Equisports (a different legal entity than Blenheim Facility Management), the Orange County Horse Show Association, the Orange County Interscholastic Equestrian League, and Victory Horse Shows. Each of these groups operate events of differing scales and may require different amenities (i.e. rings, fields, etc.). A summary of the dates and amenities requested by each of these groups for the 2018 calendar year is available for download (please see Section XI on page 30 for additional information).

**Soccer Uses** – Soccer uses at the Riding Park have been accommodated when the fields were not in use for horse shows or otherwise under rest / maintenance. The primary soccer user has been So Cal Development Soccer, who has typically used the fields at the Riding Park on weekends from late September through early December.

**Rancho Mission Viejo Rodeo** – The Rancho Mission Viejo Rodeo is typically held during the last week of August each year. The rodeo will hold its 19<sup>th</sup> annual event this year, and boasts the richest two-day rodeo in the nation with a purse of totaling over \$180,000.

Figure 2: Site Aerial

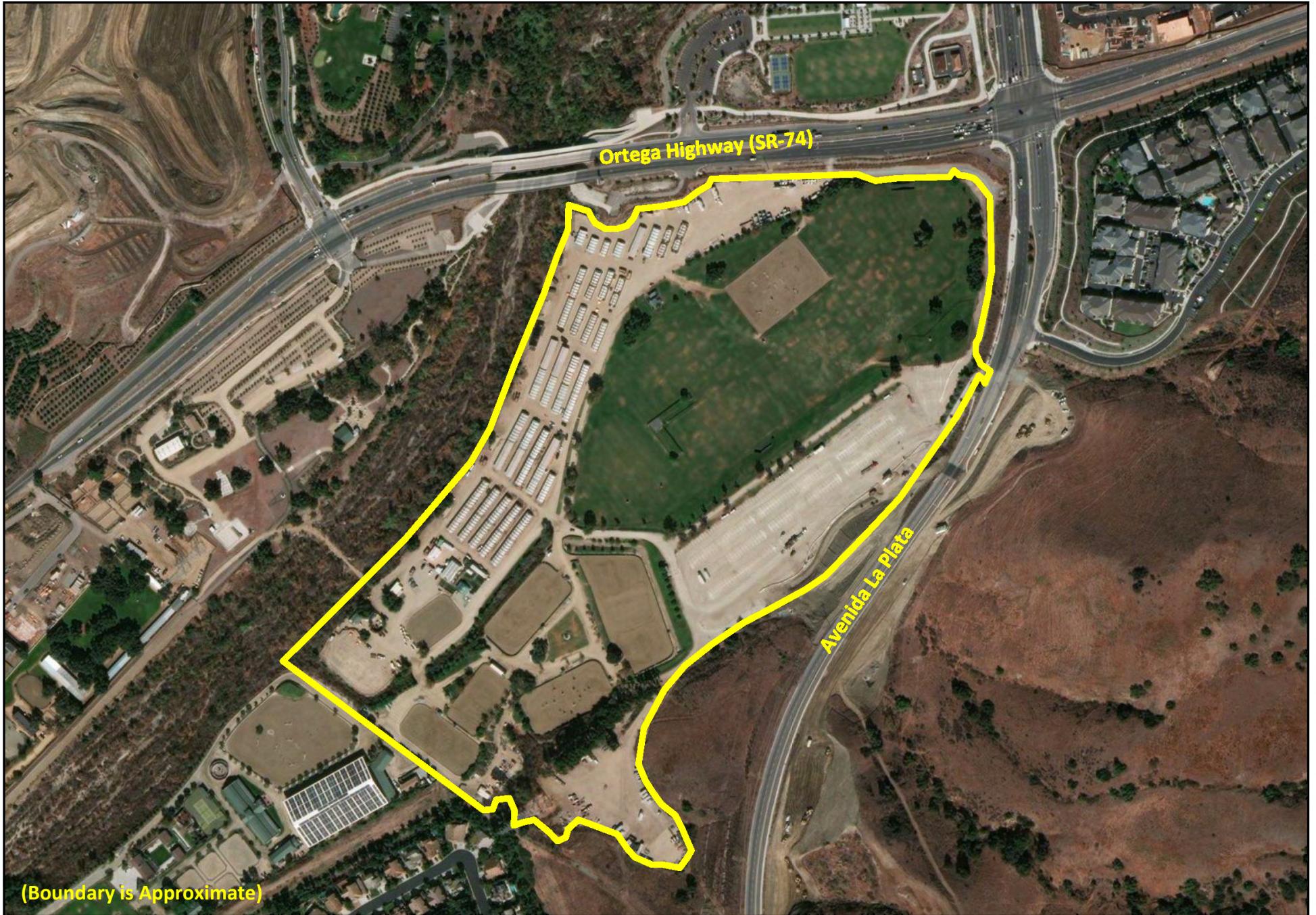


Figure 3: Site Aerial with Current Configuration



### III. Area & Market Information

#### Location

The Riding Park is located at the eastern edge of the City of San Juan Capistrano, which is in the southern portion of Orange County, California.

Figure 4: Area Map & Site Location



**California** - California is home to more than 39.5 million residents, is a destination for 38.9 million visitors from other states annually, and is the port of entry for 6.5 million international visitors annually (each via air travel in 2017). California represents the fifth largest economy in the world.

**Southern California** – Southern California is generally comprised of Imperial, Los Angeles, Orange, Riverside, San Bernardino, San Diego, Santa Barbara, and Ventura counties. It is home to roughly 22 million residents, and is considered the third most populous megalopolis in the United States. The region features a diverse and growing economy, a temperate climate, and a wide variety of recreational and cultural offerings.

**Orange County** – Orange County is considered by many to be the most picturesque region in Southern California, and is home to over 3.2 million people. The county is comprised of some of the most desirable and affluent communities in the region including Laguna Beach, Newport Beach, Laguna Niguel and Dana Point.

**San Juan Capistrano** - The City has had a long and vibrant history from the establishment of the Mission San Juan Capistrano in 1776. The City sits in an idyllic setting amid lush rolling hills along San Juan Creek. The City was incorporated in 1961, and is currently home to approximately 37,600 residents, yet remains true to its historic roots.



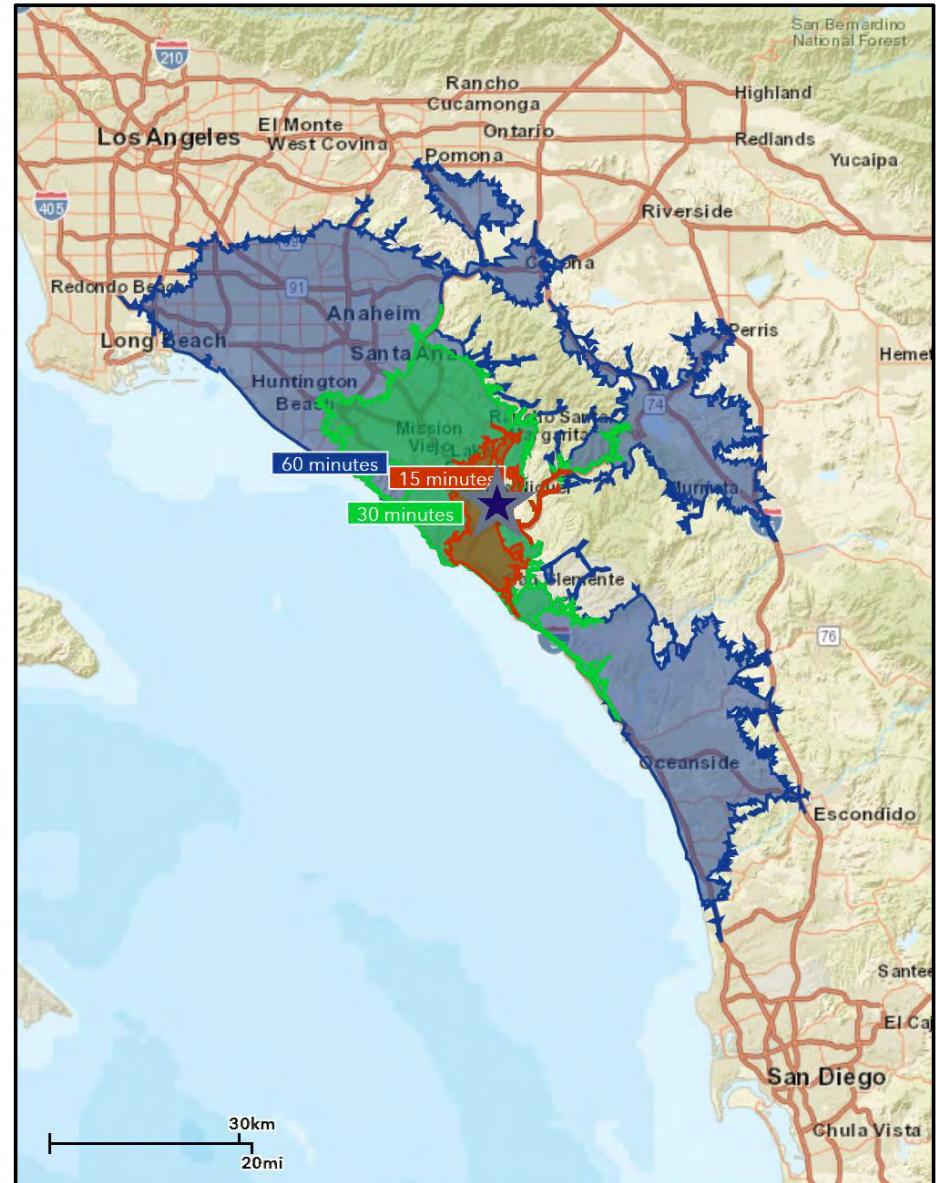
## Summary Demographic Information

The communities surrounding the Riding Park are populated by established, high earning households. The City of San Juan Capistrano is comprised of approximately 12,100 households with a median household income of approximately \$89,200, and an average household income of approximately \$135,700. The population grows quickly moving north and south of the City, to approximately 76,100, 360,900, and 1.6 million households within a 15-, 30-, and 60-minute drive of the Riding Park. Average annual household income ranges from approximately \$112,900 to \$150,200 within the same area. Additional details are provided in Table 2 below, and a map of the area within a 15-, 30-, and 60-minute drive of the Site follows in Figure 5 below.

Table 2: Summary Demographics - City, 15-, 30-, 60-Minute Drive

	City	15-Minute Drive	30-Minute Drive	60-Minute Drive
<b>Population</b>	37,600	218,200	969,200	4,926,300
<b>Households</b>	12,100	76,100	360,900	1,607,500
<b>Average HH Size</b>	3.1	2.9	2.6	3.0
<b>Median Age</b>	41.0	40.3	39.5	36.6
<b>Median HH Income</b>	\$ 89,200	\$ 111,000	\$ 104,400	\$ 81,400
<b>Average HH Income</b>	135,700	150,200	142,200	112,900

Figure 5: Summary Demographics - City, 15-, 30-, 60-Minute Drive

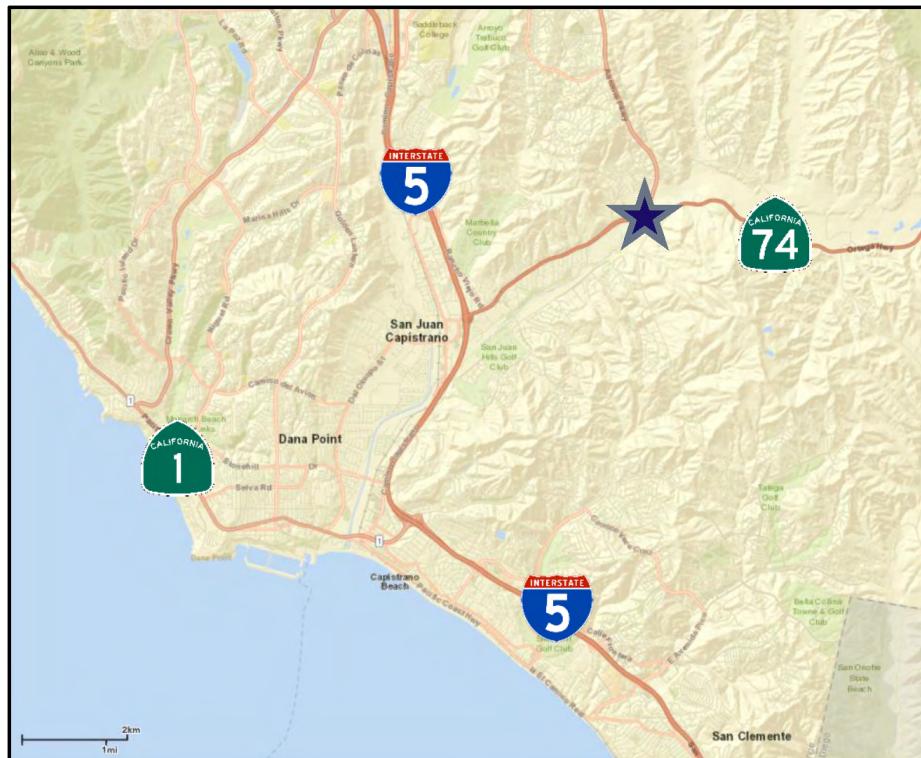


## Area Transportation & Access

The Riding Park is readily accessible and served by a number of major roads, rail, and is proximate to five major commercial airports.

**Roadways** – The primary access route to the Riding Park is via State Route 74 / the Ortega Highway. The Ortega Highway runs immediately north of the Site, and connects southern Orange County to western Riverside County. The Riding Park is less than a five-minute drive from Interstate 5. A map of proximate roads follows in Figure 6 below.

Figure 6: Major Roadway Corridors & Access



**Airports** – The Riding Park is proximate to five major airports. Santa Ana / John Wayne Airport (SNA) is approximately 23 miles from the Site, and provides both commercial and general aviation services. The airport has a 5701 x 150 foot runway, a 2887 x 75 foot runway, two FBO's, provides 100LL, JetA, JetA+, and major airframe and powerplant service. Other proximate commercial airports include the Los Angeles International Airport (LAX, 60 miles), San Diego International Airport (SAN, 68 miles), Long Beach Airport (LGB, 42 miles), and the Ontario International Airport (ONT, 60 miles). A map illustrating the location of these airports is provided in Figure 7 below.

Figure 7: Map of Proximate Airports

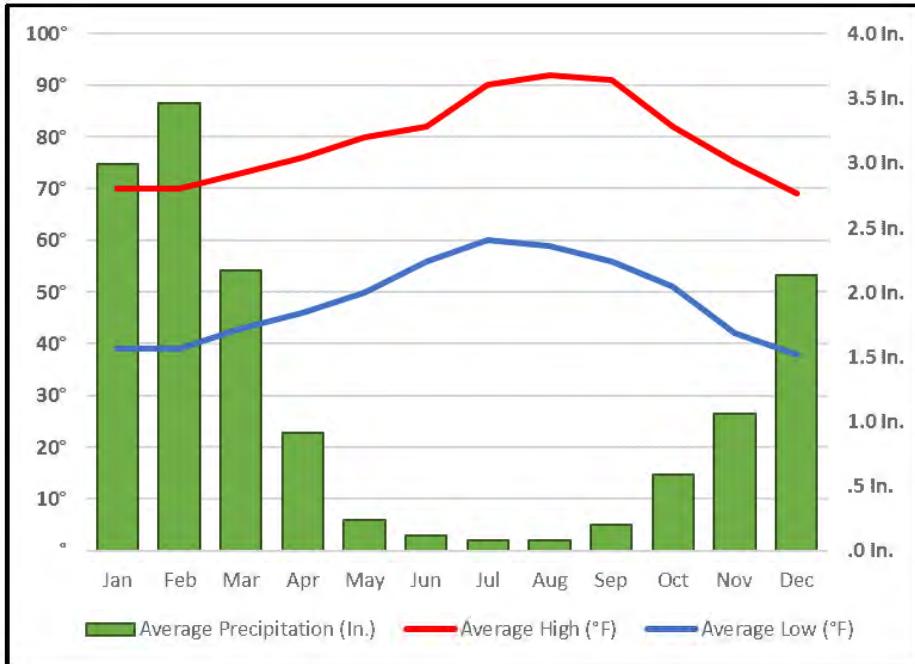


**Rail Service** – Both Metrolink and Amtrak provide frequent service from downtown San Juan Capistrano (three miles from the Site) to destinations throughout Southern California. Metrolink service provides easy access to the greater Los Angeles – San Diego – Riverside metropolitan area. Amtrak's Pacific Surfliner route provides 11 additional daily trips between Los Angeles and San Diego, and five daily trips north to Santa Barbara, and San Luis Obispo (with stops to multiple destinations along the way).

## Weather

San Juan Capistrano has a temperate climate with average daytime temperatures ranging from the 70s to the low 90s, average nighttime temperatures ranging from the 40s to the 60s, and an average of 14 inches of rain annually. Additional details follow in Figure 8 below.

Figure 8: Average Weather Patterns in San Juan Capistrano



## Daylight Hours

As will be discussed in Section V, there are restrictions on the use of permanent lighting on the Site. As a result, activity at the Riding Park must either occur during daylight hours, or must be lit with temporary lighting. These restrictions may require further evaluation. A summary of the number of daylight hours at the Riding Park during different times of year follows in Figure 9 below.

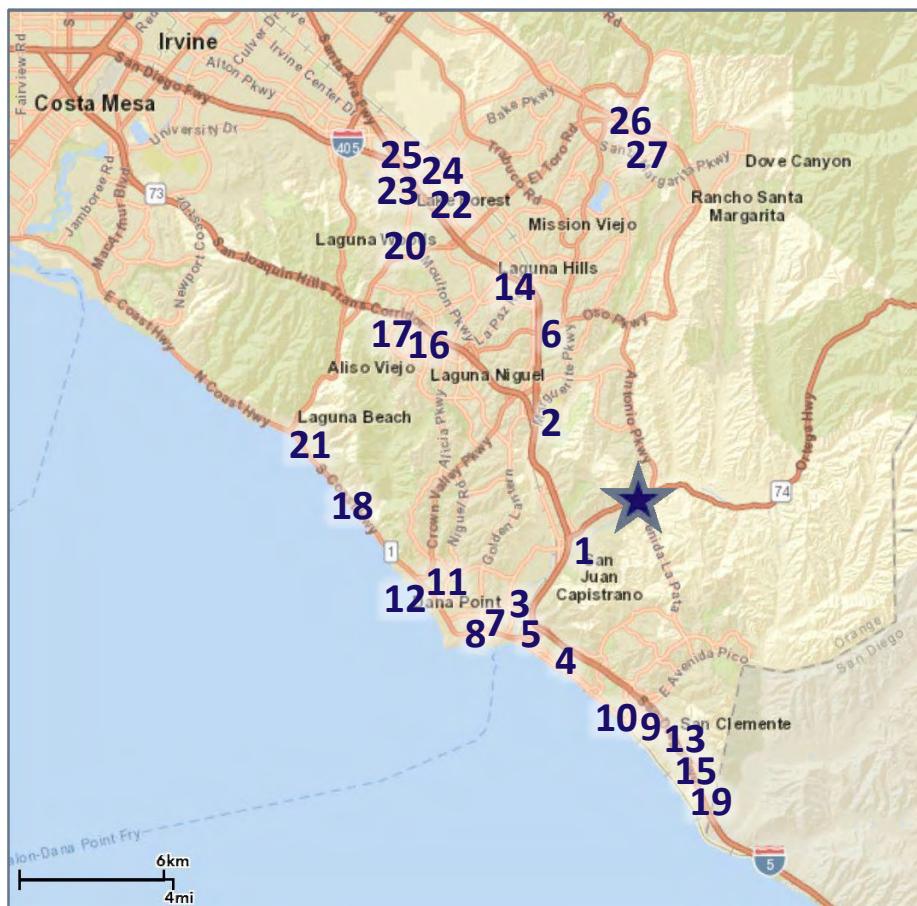
Figure 9: Hours of Daylight at Site

	Day of Month		
	1	15	30
January	10.0	10.2	10.5
February	10.6	11.0	-
March	11.5	12.0	12.5
April	12.6	13.0	13.5
May	13.5	13.9	14.2
June	14.2	14.4	14.4
July	14.3	14.2	13.8
August	13.8	13.4	12.9
September	12.9	12.4	11.9
October	11.8	11.4	10.9
November	10.8	10.4	10.1
December	10.1	10.0	10.0

## Area Hotels

There are a wide variety of hotels that provide almost 4,000 rooms within ten miles of the Riding Park. Of the 4,000 rooms, approximately 1,300 are of Upper Midscale chain scales, approximately 800 are Upscale, approximately 550 are Upper Upscale, and more than 1,000 are Luxury. A map and table of proximate hotels follow in Figure 10 and Table 3 below.

Figure 10: Map of Proximate Hotels



The “Inn at the Mission,” a new 124-room, four-star luxury boutique hotel is currently under construction in downtown San Juan Capistrano and is slated to open in November 2019. An application for a second, four-star hotel in the downtown is expected to be submitted in Spring 2019.

Table 3: List of Proximate Hotels

Hotel	Distance	Rooms	Chain Scale
1 Best Western Capistrano Inn	2.2	108	Midscale
2 Hampton Inn Mission Viejo	3.4	101	Upper Midscale
3 Residence Inn Dana Point San Juan Capistrano	4.3	130	Upscale
4 Best Western Plus Dana Point Inn By The Sea	5.0	28	Upper Midscale
5 DoubleTree by Hilton Doheny Beach	5.0	196	Upscale
6 Fairfield Inn Mission Viejo Orange County	5.1	146	Upper Midscale
7 Best Western Plus Marina Shores Hotel	5.2	87	Upper Midscale
8 Marriot Laguna Cliffs Resort & Spa	5.4	378	Upper Upscale
9 Holiday Inn Express San Clemente North Beach	5.7	110	Upper Midscale
10 Best Western Plus Casablanca Inn	5.8	63	Upper Midscale
11 Monarch Beach Resort	5.9	400	Independent (Luxury)
12 Ritz-Carlton Laguna Niguel	6.2	396	Luxury
13 Ascend Collection The Volare	6.2	73	Upscale
14 Ascend Collection The Hills Hotel	6.4	148	Upscale
15 Hampton Inn San Clemente	7.5	69	Upper Midscale
16 Homewood Suites by Hilton Aliso Viejo Laguna Beach	7.6	129	Upscale
17 Renaissance ClubSport Aliso Viejo Laguna Beach	7.6	174	Upper Upscale
18 Montage Laguna Beach	7.7	248	Luxury
19 Comfort Suites San Clemente Beach	8.3	63	Upper Midscale
20 Ayers Hotel Laguna Woods	8.9	138	Upper Midscale
21 Holiday Inn Laguna Beach	9.1	54	Upper Midscale
22 Best Western Plus Irvine Suites Hotel	9.2	90	Upper Midscale
23 Holiday Inn & Suites Irvine Spectrum	9.3	148	Upper Midscale
24 Courtyard Laguna Hills Irvine Spectrum Orange County	9.3	136	Upscale
25 Quality Inn & Suites Irvine Spectrum	9.4	111	Midscale
26 Ayres Hotel & Spa Mission Viejo	9.5	90	Upper Midscale
27 Ayres Suites Mission Viejo	9.5	115	Upper Midscale
			3,929

## IV. Site Utilities

There are some limited permanent utilities on the Riding Park. A summary of existing and available utilities follows.

### Power

Permanent electrical service is currently only provided to the Riding Park offices. During shows and events, power needs for lighting and amenities is typically accommodated through the use of generators. Permanent power can be installed throughout the majority of the Site, and would require investment in the required on-site infrastructure.

### Sewer

In 2017, the City completed environmental review and engineering design to add a permanent sewer line within the Site. Work on the sewer was completed in 2018 and includes an approximately 2,120-foot-long, 8" diameter sewer line with five laterals that service the existing office and washdown areas. For reference, the sewer main is approximately eight to 14 feet deep. Additional details are provided in Figure 11 below.

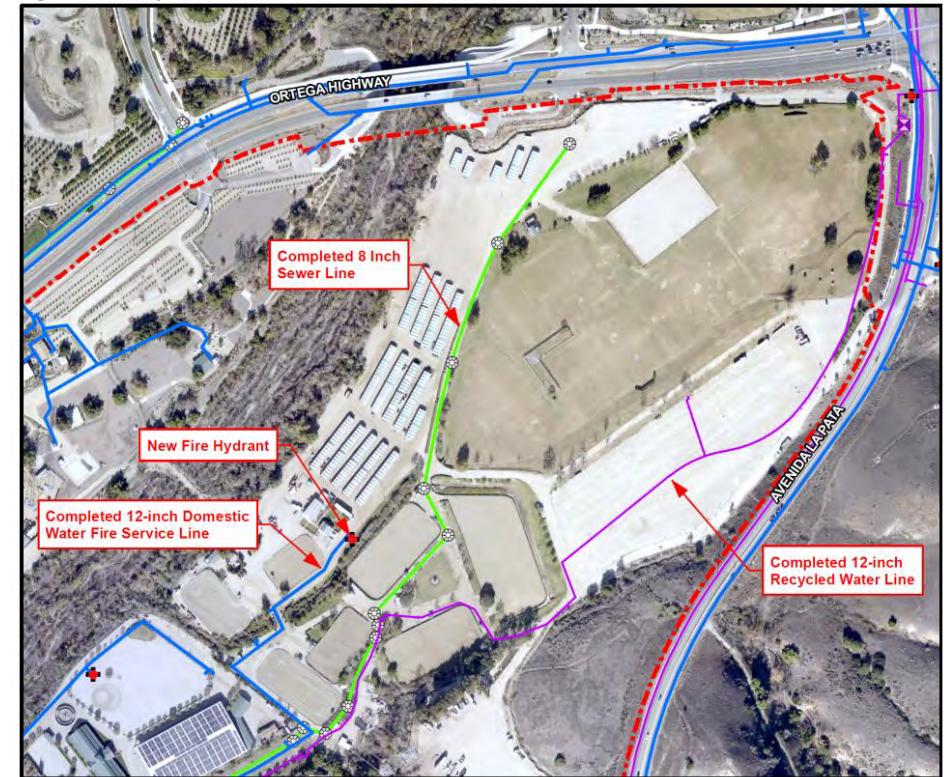
### Water

Irrigation water is currently sourced from a well on an adjacent property under a voluntary agreement with the landowner of that property. In 2017 the City also completed environmental review and engineering design to add a domestic water service, a fire hydrant, and expand recycled water service within the Site. In 2018 the City installed a 12" water line to provide domestic water and service a fire hydrant proximate to the offices. In addition, an 8" recycled water line segment

was added to the existing 12" recycled water line that serves the Site. The new recycled water line is designed to accommodate irrigation demand of 400 gallons per minute. Additional details are provided in Figure 11 below.

It may also be possible to add an irrigation well near the northern boundary of the Site. Such a well would be limited to drawing no more than 300 gallons of water per minute (under a deed restriction).

Figure 11: Map of Water Service & Sewer



## V. Permitted Uses

In addition to local, State, and Federal law, operation of the Riding Park is subject to a variety of provisions that regulate activities on the Site. A summary of these provisions as they currently exist follow. The City is open to working with appropriate parties to evaluate if any desired modifications may be achievable.

### Rancho Mission Viejo Rodeo

As a condition to the City's original purchase of the Riding Park, the Riding Park must be made available without charge during the last two weeks of August for the Rancho Mission Viejo Rodeo (or similar event) each year. While the restriction under the Purchase and Sale Agreement requires that the Riding Park be made available for the full two weeks, historically, the Rodeo has only required use of the Site for a ten-day period commencing on a Friday, and ending on a Sunday. Events are typically held on the last Saturday and Sunday of this period.

### Maximum Weekday Vehicular Trips

A deed restriction was placed on the Site as a condition to the City's purchase of the Riding Park that limits the number of weekday vehicular trips to and from the Site. The full language of the deed restriction follows:

#### *Maximum Allowed Traffic*

*Subject to all applicable governmental laws, rules and restrictions, Seller places no restriction on City relating to the maximum number of trips to and from the Property on weekends and the following holidays: New Years, Memorial Day, Fourth of July, Labor Day, Thanksgiving and Christmas.*

*The maximum number of trips during the weekday P.M. peak hours from the equestrian facilities, sports field complexes and other allowed uses on the Property*

*shall not exceed a total of 203 trips (combined inbound and outbound trips). The City may allocate these trips among the allowed uses in its discretion so long as the maximum number of trips specified above is not exceeded.*

*For purposes of calculating the number of trips from equestrian and sports field uses, a trip generation factor of 1.0 P.M. peak hour trip for each permanent equestrian stall and a factor of 20.67 P.M. peak hour trips per sports field/soccer field shall be applied.*

#### *Explanation of and Guide to Application of the "Maximum Allowed Traffic" Restriction*

*Based on projections of future traffic associated with Planning Area 1 of the Ranch Plan, which includes the Property, Seller's primary concern is the traffic to be generated during the weekday P.M. peak hour (i.e., 4:45 p.m. to 5:45 p.m.). For that reason, the maximum allowed traffic restriction set forth above is keyed to the weekday P.M. peak hour. In short, the restriction requires the City to manage its operations and events to ensure that traffic generated from uses on the Property during that time period would not exceed 203 trips (combined inbound and outbound trips). As noted above, the City may allocate these trips among the allowed uses in its discretion so long as the maximum number of trips specified is not exceeded.*

*Given the nature of the uses to be conducted on the site, which are expected to be primarily a continuation of uses conducted on the Property over the past several years, it is not expected that the traffic limitation would unduly restrict the City's use of the Property. For example, most of the horse shows typically occur over 2 or more days and are low spectator events, with traffic to and from those activities being spread more or less evenly over those periods. Furthermore, horse trailers do not generally operate during the peak hours.*

*It should be noted that the above-stated trip generation rate of one (1) P.M. peak hour trip per horse stall does not pertain to the temporary stalls used in conjunction with the horse shows. That rate pertains to permanent stalls expected to be associated with the one (1) allowed commercial stable on the Property. Thus, for example, if there were 50 occupied horse stalls at the commercial stable, they would be expected to generate 50 trips during the P.M. peak hour.*

*With regard to sports field/soccer field uses on the Properly, a factor of 20.67 P.M. peak hour trips would be applied as stated above. Thus, for example, if there were 4 sports fields/soccer fields in operation during weekday afternoon/evening hours, a total of 83 P.M. peak hour trips would be expected.*

---

In summary, the cumulative trips associated with the horse shows, the permanent horse stalls and other allowed uses such as sports field uses (see below), would be considered in determining whether the maximum allowed traffic limitation was being complied with. Using the above examples, with 50 permanent horse stalls and 4 sports fields, a total of 133 P.M. peak hour trips would be generated, leaving 70 P.M. peak hour trips available for any horse shows or other events taking place at the same time.

It should be emphasized that trips to and from the Property on weekend days (i.e., Saturday and Sunday) and the holidays described above are not restricted. Thus, it would be expected that major events on the Property would be held on these days. In fact, given the maximum allowed traffic limitation, any event that would result in more than 203 P.M. peak hour trips, when the traffic from that event is added to traffic from other allowed uses on the Property, would be required to be held on the weekend.

In any event, the City is required to regulate any proposed major weekend activity such that it would not create significant adverse impacts on the circulation system and not adversely affect existing and future residents in the area due to parking, dust, noise, light and glare or other impacts. To help reduce the potential for light and glare impacts, RMV has prohibited the use of permanent lighting on the site.

The application of normally required conditional use or other permit requirements of the County (or the City, after annexation of the Property), and CEQA review associated with such permitting, would be expected to adequately regulate such events and to ensure appropriate mitigation measures are applied where indicated.

## Ranch Plan Planned Community EIR

A deed restriction was placed on the Site as a condition to the City's purchase of the Riding Park that among other conditions, restricts uses of the Site to those permitted under Section III-H and Section III-J of The Ranch Plan Planned Community Program Text associated with the Ranch Plan Planned Community EIR. The language of Section III-H and Section III-J follows, and all documents associated with the Ranch Plan / Rancho Mission Viejo can be accessed at the following link [Ranch Plan EIR Documents](#). For reference, the Riding Park is within the area referred to as "Planning Area 1" in the Program Text.

### (III-H)

#### **H. AGRICULTURAL AND OTHER EXISTING AND ON-GOING USES**

The purpose and intent of this Section is to allow for uses compatible with the existing agricultural and low intensity nature of the Ranch Plan PC area, and consistent with the A1 "General Agricultural" District Regulations of Zoning Code Section 7-9-55. These uses include non-agricultural uses consistent with the open space nature of agricultural uses. It is also intended that these uses (agricultural and non-agricultural) may be allowed as interim uses within Ranch Plan PC Planning Areas designated for future development.

- 1 Agricultural Uses:** The following existing, relocated and future farming and ranching uses shall be allowed within any Planning Area, in addition to uses allowed by the A1 "General Agricultural" District Regulations per Zoning Code Section 7-9-55, subject to mitigation measures identified in the Ranch Plan Final Program EIR 589, per the procedures described in Section III.H.3 hereof:
  - a) Grazing (cattle, horses, sheep, goats, etc.).
  - b) Farming (citrus farming, dry farming, and row crops).
  - c) Caretaker housing and related facilities in relation to on-going agricultural and ranching operations, including the "Ranch House" residence located south of Ortega Highway in Planning Area 10 and the "Horse Ranch" residence at 33101 Ortega Highway in Planning Area 4.
  - d) Employee quarters related to agricultural uses.
  - e) Livestock feeding ranches in compliance with applicable health and safety regulations.
  - f) Packing plants for agricultural products.
  - g) Permanent facilities for sale of agricultural products grown within the Ranch Plan PC Area.
  - h) Apiaries (if 150 feet from a street or highway, 40 feet from any property line and more than 400 feet from an occupied dwelling).
- 2 Existing Uses:** The following existing uses shall be allowed in appropriate locations throughout the Ranch Plan PC Area, per the procedures in Section III.H.3 hereof:
  - a) Rancho Mission Viejo headquarters ("Oficina") at 28811 Ortega Highway, including a heliport.
  - b) Ladera construction offices at 28811-A Ortega Highway.
  - c) Rancho Mission Viejo maintenance yard at 28672 Ortega Highway.

- d) Ranching facilities also used periodically for recreational purposes (including "Cow Camp" at 31471 Ortega Highway, and "Amantes Camp" and "Campo Portola" within Planning Area 10).
- e) Communication transmitting, reception or relay facilities (including AirTouch/PacBell Wireless, Bell South, Saddleback KSBR, SDG&E, and SCE) and RMV Telecom antenna sites.
- f) Public/private utility buildings and structures.
- g) Existing infrastructure facilities including but not limited to all existing ranch roads, pipelines and utilities. Of particular note, reconstruction of the San Juan Creek crossing of roadways and utilities connecting Planning Area 3 to Ortega Highway shall be allowed in the event of storm damage.
- h) Wholesale nurseries (including Tree of Life Nursery, Color Spot Nursery, DM Color Express Nurseries, Tru-Green Wholesale Nurseries and O'Connell Landscaping yard).
- i) Commercial stables (including Oaks/Blenheim/Rancho Mission Viejo Riding Park, Oaks Corral/J. Irvine Smith, RJO Horse Ranch, St. Augustine's Training Center and Stables).
- j) Research and development testing facilities and activities (including TRW, Northrop Grumman Space Technology and Propulsion Testing Site).
- k) Waste disposal operations and related uses (including Solag Disposal, Tierra Verde Industries and La Pata Greenwaste).
- l) Storage of recreational vehicles, campers, trailers and boats.
- m) Recycling and transfer/materials recovery facilities per Zoning Code Section 7-9-146.12 (including Elwes Materials Asphalt Recycling).
- n) Surface mining and quarrying of rock, sand, gravel, aggregate, earth, clay and similar materials per Zoning Code Section 7-9-104 (including California Portland Cement/Catalina Pacific Concrete South, California Silica/Ogleby Norton, Transit Mixed Concrete Company/City Concrete, Olsen Pavingstone, Inc. and Sierra Soils).
- o) Resource mitigation sites for the preservation or replacement of native, riparian or other biological habitat, as approved by the appropriate regulatory agency (e.g., Army Corps of Engineers, U.S. Fish & Wildlife Service California Department of Fish and Game and/or the County).

### 3. Procedures:

#### a. Continuation of Existing Uses

- 1) Agricultural and existing uses listed in Sections III.H.1 and III.H.2, respectively, may continue in their present location(s) in perpetuity without need for subsequent permitting or approval.
- 2) Any buildings, structures or other facilities utilized in connection with an established/existing use may be repaired, replaced or modified without obtaining new permits or approvals; provided, however, that any and all construction activities performed in furtherance of the repair, replacement and/or modification of said buildings, structures and facilities shall comply with applicable building and safety codes.
- 3) In instances where a use listed in Sections III.H.1 and III.H.2 is allowed per a Use Permit, and that particular Use Permit is subject to a time limitation, the Use Permit may be renewed administratively per approval of the Director, PDS.
- b. Expansion of Existing Uses
  - 1) Agricultural Uses – Any agricultural use listed in Section III.H.1 may be expanded without the need to obtain a prior permit or other approval from the County. Notwithstanding, expansion of an agricultural use may require the issuance of a permit or other formal authorization from a federal or state agency prior to commencement or use of the expanded facility. Additionally, any construction activities performed in furtherance of the expanded use shall comply with applicable building and safety codes.
  - 2) Existing Uses – Any existing use identified in Section III.H.2 may be expanded without the issuance of new County approvals or permits, provided that:
    - (a) Any expansion shall fully comply with all existing development and permitting standards for the particular use;
    - (b) All construction activities performed in furtherance of the expansion are conducted in accordance with applicable building and safety codes; and
    - (c) All necessary permits and/or authorizations from applicable federal and state agencies are obtained prior to commencement or use of the expanded facility.
- c. Relocation of Existing Uses
  - 1) Agricultural Uses – Any existing use identified in Section III.H.1 may be relocated within or throughout the Ranch Plan PC Area without the need for issuance of a new permit or other prior approval from the County. Notwithstanding, relocation of an existing agricultural use

---

*may require the issuance of a permit or other formal authorization from a state or federal agency prior to the desired relocation.*

2) *Existing Uses – Any existing use identified in Section III.H.2 may be relocated within or throughout the Ranch Plan PC Area, provided that:*

(a) *A Site Development Permit shall be required, per Zoning Administrator approval, in accordance with the provisions of Zoning Code Section 7-9-150.3(d);*

(b) *All necessary permits and/or authorizations from applicable federal and state agencies shall be obtained prior to relocation.*

d. *New Agricultural Uses: Consistent with the provisions of Section III.H.1, above, new agricultural uses (as well as any authorized uses identified within the A1 “General Agricultural” District) may be conducted within any Planning Area without the issuance of any County approvals or permits, provided that:*

1) *All new facilities, structures and buildings shall comply with existing development and design standards;*

2) *All construction activities performed in connection with the establishment of the new use(s) shall comply with applicable building and safety codes; and*

3) *All necessary permits and/or authorizations from applicable federal and state agencies shall be obtained prior to commencement of the new use.*

**(III-J)**

**J. TEMPORARY USES PERMITTED**

*The purpose and intent of this Temporary Uses Permitted chapter of the Ranch Plan PC Text is to list all temporary uses that shall be allowed within all Planning Areas and use categories (with the exception of the Open Space (Section III.I) category, unless otherwise restricted below. Said temporary uses include, but are not limited to:*

- 1 *Construction activities (including the installation of construction offices and the storage of equipment and materials).*
- 2 *Construction office. The temporary use of a construction office during the construction of a main building on the same site shall be permitted upon the following conditions:*
  - a. *A temporary construction office shall be removed or shall be converted to a permitted use prior to the issuance of a certificate of use and occupancy for the main building or buildings. If construction is phased over a length of time, the permit may provide that certificates of use and occupancy may be issued for completed*

*buildings, except the last buildings to be completed, prior to removal or conversion of the temporary use.*

3. *Continued use of an existing building during construction. The use of an existing, lawfully established building may continue during construction or relocation of another building on the same building site, in compliance with the following provisions:*

a. *Conformity with regulations. Prior to occupancy of a new building, the existing building will be brought into conformity with any additional regulation rendered applicable by the placement of any new building on the site. Conformity will be accomplished by removal, reconstruction, relocation, conversion, change of use or any combination thereof.*

b. *Guarantee of completion. The Director, PDS, shall require the landowner to provide a guarantee, which may include a bond, to ensure full compliance with applicable regulations upon completion of the new building or sooner if, in the opinion of the Director, PDS, work pertaining to the completion of all facilities required by law is not being diligently pursued.*

4. *Temporary excavation/extraction of construction aggregate or construction related materials extraction shall be allowed during construction grading and on-site earthmoving activities to promote project construction efficiencies and limit long-range transportation of construction aggregate and construction related material subject to all of the following conditions:*

a. *Such temporary excavation/extraction use would be included in applicable grading or Site Development Permits for a development project and consistent with the Ranch Plan PC and Final Program EIR 589.*

b. *Exportation of any surplus excavated/extracted construction aggregate or construction-related materials shall be limited to private or public construction projects within the boundaries of the Ranch Plan PC Area.*

c. *Exportation of any surplus excavated/extracted construction aggregate or construction related materials within the project site shall be allowed only when actual construction grading and earthmoving activities have commenced and shall cease when it is determined that construction grading and earthmoving activities have terminated, have been indefinitely suspended, or are no longer being actively pursued for the development project.*

---

- 5. *Commercial coaches.* A temporary commercial coach may be permitted subject to approval of a Site Development Permit in accordance with Section II.C, "Site Development Permits," and subject to the following:
  - a. *Time limitation.* A Site Development Permit application for a temporary commercial coach may be approved for a maximum of two (2) years from the date of approval.
  - b. *Cash bond.* A cash bond in the amount of five hundred dollars (\$500.00) for each commercial coach unit shall be posted with the Director, PDS, to guarantee the removal of each commercial coach unit upon the expiration of the Site Development Permit.
- 6. *Christmas tree sales facility.* A temporary Christmas tree sales facility shall be permitted subject to the following requirements:
  - a. *Date of opening.* A Christmas tree sales facility shall not be open for business during any calendar year prior to the day after Thanksgiving. However, ministerial permits necessary to establish the business may be issued by November 15.
  - b. *Merchandise to be sold.* A permitted Christmas tree sales facility shall not engage in the sale of any merchandise not directly associated with Christmas trees and Christmas decorations.
  - c. *Electrical permit.* The applicant shall secure an electrical permit from the Director, PDS if the facility is to be energized.
  - d. *Removal of facility.* The facility shall be removed and the premises shall be cleared of all debris and restored to the condition prior to the establishment of the facility within fourteen (14) days after Christmas.
  - e. *Fire prevention standards.* Each Christmas tree sales facility shall comply with fire prevention standards as approved and enforced by the County Fire Chief.
- 7. *Halloween pumpkin sales facility.* A temporary Halloween pumpkin sales facility shall be permitted subject to the following requirements:
  - a. *Date of opening.* A Halloween pumpkin sales facility shall not be open for business during any calendar year prior to October 4.
  - b. *Merchandise to be sold.* A permitted Halloween pumpkin sales facility may not sell items not directly associated with pumpkins and Halloween decorations.
  - c. *Electrical permit.* The applicant shall secure an electrical permit from the Director, PDS if the facility is to be energized.
- d. *Removal of facility.* The facility shall be removed and the premises cleared of all debris and restored to the condition prior to the establishment of the facility by November 14.
- e. *Fire prevention standards.* The facility shall comply with fire prevention standards as approved and enforced by the County Fire Chief.
- 8. *Special outdoor gatherings.* The temporary use of property for special outdoor gatherings including, but not limited to, pageants, fairs, carnivals, rodeos and other athletic, religious or entertainment events. Such activities are permitted, without regard for other land use regulations to the contrary, in any open space Planning Area in compliance with the following provisions:
  - a. Activities on property owned by or leased to the County and public road rights-of-way may require an encroachment permit issued by the Director, PDS.
  - b. Private outdoor gatherings conducted within open space areas (including those open space areas regulated by Section III.I) shall not be subject to the restrictions and requirements established in Zoning Code Section 7-9-136.11, "Special Outdoor Gatherings".
  - c. The temporary use may be permitted for a period not to exceed ten (10) consecutive days. Events recurring more than four (4) times in a calendar year are not considered temporary.
  - d. The Director, PDS may require a cash bond or other guarantee for removal of the temporary use, cleanup and restoration of the activity site within seven (7) days of the activity conclusion.
  - e. Applications for permits/certificates required by subsections "a." and "b." above, shall be referred by the Director, PDS, to other affected County agencies as may be appropriate for review and comment.
  - f. Related issues including, but not limited to, police/security, food and water supply, use of tents and canopies, sanitation facilities, medical services, noise, signage, fire protection and traffic control shall be satisfactorily addressed as may be required by the Director, PDS, Sheriff, Fire Chief, or Health Officer in their administration of other County codes. Such other codes may require the applicant to obtain permits such as building, electrical, health and tent permits.
- 9. *Farmers' Markets and off-site sale of agricultural products.* A temporary stand for the sale of seasonal agricultural products not grown within the Ranch Plan PC Area shall be permitted subject to the following requirements:

- a. Establishment of use/time limit. Prior to beginning sale of any product, the applicant shall obtain a temporary Certificate of Use and Occupancy for land from the County. The Certificate shall be good for a period time of not to exceed 90 days from date of issue.
- b. Merchandise to be sold. The stand shall be limited to the sale of agricultural products.
- c. Electrical permit. The applicant shall secure an electrical permit from the Director, PDS if the facility is to be energized.
- d. Removal of facility. The facility shall be removed and the premises cleared of all debris and restored to the condition prior to the establishment of the facility within fourteen (14) days of the expiration of the time limit.
- e. Fire prevention standards. The facility shall comply with fire prevention standards as approved and enforced by the County Fire Chief.
- f. Site Development Permit. In addition to the above requirements, an approved Site Development Permit in accordance with Section II.C, "Site Development Permits," shall be required.

10. Fireworks displays, as allowed by the Orange County Fire Authority.

11. Subject to the approval of the Director, PDS, a landowner may conduct such other temporary uses upon his property as are consistent with the purpose and intent of this Section.

## Rancho Mission Viejo, LLC

The Riding Park and adjacent properties were sold to the City by RMV Community Development, LLC (a California limited liability company), and DMB San Juan Investment North, LLC (a Delaware limited liability company). These entities are affiliated with Rancho Mission Viejo, LLC. The deed restrictions discussed above were included as a condition of the sale of the Site to the City. A copy of the grant deed with these deed restrictions is available for download from the FTP site listed in Section XI below. For reference, the Riding Park is generally contained in what is identified as Parcel 7 therein. More information on Rancho Mission Viejo, LLC can be accessed at the following link: [Rancho Mission Viejo Corporate Information](#).

## Concentrated Animal Feeding Operation

Utilization of the Riding Park to stable large numbers of horses may require a Concentrated Animal Feeding Operations ("CAFO") permit pursuant to the United States Clean Water Act. A "Large" CAFO permit is generally required if a site hosts 500 or more horses for 45 or more days in a 12-month period. A "Medium" CAFO permit is generally required if a site hosts 150 - 499 horses for 45 or more days in a 12-month period and (i) a man-made ditch or pipe carries manure or wastewater from the site, or (ii) the horses come in contact with surface water running through the area where they're confined. Regardless of the number of horses hosted on a site, it can still be designated as a CAFO if the local permitting authority inspects an operation and finds that it is adding pollutants to surface waters.

Generally, all CAFOs must implement a management and testing plan. Large CAFOs must also be designed to contain all manure, plus the runoff from a 25-year, 24-hour rainfall event. Estimates recently prepared for the City suggest it would require a substantial capital investment to construct the infrastructure required to obtain a Large CAFO permit. Approval and oversight of a CAFO permit for the Riding Park would be completed by the San Diego Region of the California Regional Water Quality Control Board.

It is expected that the new operator will comply with all local, State, and Federal laws.

---

## VI. Transaction Structure

The City will consider proposals for conveyance of operational and/or Site control through a lease, management agreement, or a license. The City will not consider a sale of the Riding Park.

The Riding Park is held by the City in fee, subject to certain deed restrictions as described in Section V above. Historically, the City has retained BFM to operate the Riding Park under management agreements of varying durations, but generally two years.

The City may consider terms with a range from five to 20 years. Longer durations may be granted commensurate with the level of investment proposed, prior operational experience, and strength of reinvestment provisions. Durations shorter than this range may be considered as trial periods for operators with limited experience.

The City expects that the selected operator will make a significant capital investment in the Riding Park and is willing to consider lease structures and terms which facilitate acceptable operator returns on a present value basis. The City may also consider investing in infrastructure improvements on the Riding Park given sufficient potential for a return on investment.

The City is willing to consider participation-based rent formulas, and would require that such proposals include base / minimum rent provisions. Historically, the City has received approximately \$250,000 per year in net revenues from the Riding Park.

The City welcomes proposed lease structures and terms for consideration and discussion. This RFQ/P and selection process does

not constitute any type of offer and creates no contractual or other liability on the City or its representatives.

## VII. Other

### Public Engagement

The successful operation of the Riding Park is of great interest to residents of the City and adjacent communities. Residents of the City voted to tax themselves to support the acquisition of the Riding Park and adjacent property. A successful operator of the Riding Park will seek to make facilities and events available and inviting to the community.

A successful operator will evaluate the varying community interests and may complete a public outreach process subsequent to selection to best achieve a favorable outcome. The City will provide assistance in facilitating this process by identifying key stakeholders. However, like any project of this nature, a successful public input and outreach process will ultimately be the responsibility of the operator. As part of the selection process, the City will evaluate examples of previous outreach and public engagement campaigns conducted by the respondent.

### City Council

San Juan Capistrano is a General Law City governed by the San Juan Capistrano City Council and operated under a council-manager form of government. Under the council-manager structure the City Manager oversees the day-to-day operations of the City and serves as the chief advisor to the City Council. The City Council comprised of five council members that are elected by and represent five individual districts. Elections are held in even number years for overlapping four-year terms. The City's Mayor and Mayor Pro Tem are selected at the first

meeting of each December to serve a one-year term. These positions are filled by sitting Council Members by a vote of the majority of members.

### Prior Litigation

In 2017, the City was sued by a non-governmental organization regarding allegations of Clean Water Act violations associated with the Riding Park. The City contended that it did not discharge pollutants into a creek in violation of federal law or any other law. The parties ultimately entered into a settlement agreement whereby the Riding Park must obtain a permit to operate a large concentrated animal feeding operation (CAFO), construct storm water improvements and maintain other water quality practices at the site if CAFO conditions continue to exist at the Site.

These improvements will include stabilization of an adjacent creek bank to protect the property, and construction of a retention basin to capture 25-year storm events in CAFO production areas, and maintain 85th-percentile stormwater best management practices in non-production areas. The City is in the process of completing engineering design and pursuing environmental approval for these improvements. A copy of the Consent Decree from the settlement is available for download from the FTP site listed in Section XI below.

## VIII. Selection Process & Timeline

The City understands that preparation of proposals and responses can be a resource intense process. The City also appreciates the scale of the opportunity being presented. In consideration of these factors the City intends to utilize a selection process that requests and provides increasing levels of information as pertinent milestones are reached and the candidate pool narrowed. The anticipated selection process and selection steps/rounds follow.

### **1. Voluntary Orientation & Site Tour – April 17, 2019**

The City will hold a voluntary pre-bid orientation and Site tour at 1:00 pm on Wednesday, April 17, 2019. Interested parties should be at City Hall (32400 Paseo Adelanto, San Juan Capistrano, CA 92675) by 1:00 pm.

### **2. Qualifications & Proposal Package – May 23, 2019**

Potential operators will be asked to submit a qualifications and proposal package to the San Juan Capistrano City Clerk at by 4:00 pm on Thursday May 23, 2019. Information requested will include a summary of similar facilities operated, a high-level description of proposed facility uses, City compensation, initial validation of financial capacity, and public outreach practices. Details of the minimum information desired for inclusion in the Qualifications & Proposal Package are provided in the following section. City staff, representatives and/or consultants will evaluate the packages and invite qualified respondents to participate in the second round.

### **3. Proposer Presentations – Early June 2019**

Short-Listed Proposers may be invited to present their proposals to City staff and consultants. The presentations will be followed by a question and answer period during which the City may seek clarifications on proposed operating concepts.

### **4. Public Presentations – Late June 2019**

Potential operators may be invited to a public City Council meeting to discuss the potential operators' proposal. The potential operator will have an opportunity to present its initial concepts and will receive input on perceived strengths and weaknesses of its preliminary proposal.

Candidates will have an opportunity to refine their proposal, and will be asked to submit a Letter of Intent to the City outlining their proposal including a high-level summary of proposed facility uses, City compensation, financial structure, and as applicable, desired elements to be provided by the City.

### **5. Letter of Intent – Early July 2019**

### **6. Selection of Preferred Candidate – July 2019**

Based on the submittals and meetings, the City Council will select the preferred operator candidate.

---

## **7. Exclusive Negotiation – After Selection**

The preferred operator candidate and the City will execute an Exclusive Negotiation Agreement ("ENA"), and enter into an exclusive negotiation period during which specific deal terms will be identified. If agreement is achieved, the parties will formalize the agreement through a lease, management agreement, or license to guide the operation of the Riding Park. This final documentation will be executed upon receipt of all prerequisite approvals.

If agreement is not achieved the City may enter into exclusive negotiation with the second preferred operator candidate.

---

## General Process Guidelines

The City reserves all rights to stop the selection process, change the selection process, go outside of the selection process to select an operator, or not select an operator at any time.

This RFQ/P and selection process does not constitute any type of offer and creates no contractual or other liability on the City or its representatives. There is no guarantee that a lease, management agreement, or license will be consummated.

The City reserves all rights with regard to this solicitation, including but not limited to the right to amend or modify this RFQ/P, reject all proposals, extend any dates, or, subject to an ENA, to initiate negotiations with the next most preferred respondent if negotiations with the preferred respondent do not result in an agreement.

The City at its sole discretion may decide to distribute none, some or all information discussed at the various meetings with prospective operators to other potential respondents. Any distribution of such information will be to all qualified respondents.

Should the City not receive qualified proposals of interest by a submittal deadline, it reserves the right to extend that deadline until qualified proposals of interest are received.

Three hard copies, as well as an electronic copy of all response materials on a USB/thumb drive should be submitted as part of the initial proposal phase.

**Materials shall be delivered to the San Juan Capistrano City Clerk at 32400 Paseo Adelanto, San Juan Capistrano, CA 92675. The deadline**

**for submission of the Qualifications & Proposal Package is 4:00 pm on Thursday, May 23, 2019.**

Respondents are responsible for ensuring submittals are actually received.

All materials submitted during any part of the selection process become the property of City. The respondent may designate portions of its submittals which contain proprietary data as "CONFIDENTIAL", but the City and its representatives cannot guarantee that it will be able to enforce such confidentiality. The City will comply with all applicable public records laws.

The City and its representatives shall not be responsible for any costs and/or obligations incurred by and/or on behalf of a potential operator in preparing, submitting or otherwise participating in any part this RFQ/P, the selection, documentation, or the general process in its entirety.

The City reserves the right to request clarification or additional information from respondents.

Information included in this RFQ/P is believed to be accurate, but should be independently verified by potential respondents prior to reliance upon.

## Process Integrity Guidelines

It shall be the policy of the City of San Juan Capistrano to adhere to the following Process Integrity Guidelines during its selection of a potential Riding Park operator pursuant to this RFQ/P.

Each proposer is individually and solely responsible for ensuring compliance with the following specific Process Integrity Guidelines. This responsibility extends to the proposer's employees, agents, consultants, lobbyists, affiliates, and all other parties or individuals engaged by proposer or otherwise acting in concert with proposer for purposes of developing or supporting the selection process.

1. This policy shall be operative from release of this RFQ/P until such time as the City Council meeting at which the City Council awards a lease, management agreement, or a license.

2. Collusive activities among proposers are expressly forbidden and may result in immediate disqualification of any involved parties. If two or more proposers are developing a joint proposal, the City's Contact (Wil Soholt of Kosmont Companies), must be notified in writing, in accordance with Section 3 below, by the joint proposers no later than ten (10) days prior to the deadline for submission of proposals. This notification will be kept confidential until after submission of Qualification / Proposal Packages by all proposals.

3. All communication related to the Request for Qualifications & Proposals with the City of San Juan Capistrano must be directed to the City's Contact (Wil Soholt of Kosmont Companies), who's contact information is provided on page 30.

4. Notwithstanding the restrictions on communications set forth in Sections 2 and 3, nothing in this policy is intended to restrict or prohibit proposers from communicating with City staff and officials during an open and public City Council or Commission meeting.

5. Any and all information provided during any part of the RFQ/P, selection, or documentation process shall be factually correct.

6. Proposers will be informed of this Council Policy and will be required to provide written acknowledgement of receipt along with, or prior to, submittal of the Qualifications & Proposal Package. Any evidence which indicates a proposer has failed to comply with the Process Integrity Guidelines described herein may result in that proposer's disqualification. Any questions regarding the Process Integrity Guidelines shall be in writing and shall be transmitted by e-mail to the City's Contact (Wil Soholt of Kosmont Companies), whose contact information is provided on page 30.

# IX. Qualifications & Proposal Package

The initial submittal shall include the following components:

## Relevant Experience

A summary of current and previous experience operating a facility comparable to the Riding Park both in size and uses. As appropriate, this information should include a facility description, photos or site plans if available, facility uses, dates operated, operator role, financial performance, role of current employees in the operation and any other key information desired.

## Transaction & Financial Data

A summary of the operators' proposed transaction structure with the City, and proposed City compensation. Additionally, a summary of the potential operators' capability and strategy to source the capital necessary to successfully fund Riding Park improvements and operations.

Include a description of the various forms of revenue expected to be generated by the use of the Riding Park and proposed capital improvements. Financial projections including gross revenues, expenses, and City compensation for the proposed term of the agreement must be provided. Include information to substantiate demand required to support revenue projections.

## Project Approach

A summary of the operator's approach and anticipated timing related to engaging public input, obtaining any required design approvals, financing, constructing improvements, and operating the Riding Park (as appropriate). Include a summary of key team members expected to participate in operations (and construction as appropriate) and resumes for the same. Provide examples of processes employed in other facilities to support successful operations.

## References

A list of no less than two financial/lending references (name, title, entity, telephone number and contractual relationship to respondent) that may be contacted with respect to current and past experience. Additionally, a reference list of and contact information for public sector elected officials and/or executive staff involved in the previous facilities identified as examples of Relevant Experience (if any, up to five).

## Legal Actions

Provide a list and brief description of all relevant legal actions for the past ten years in which the proposer or entities in which he/she/it has had ownership interests, or has been: a debtor in bankruptcy; or a defendant in a lawsuit for deficient performance under a contract; or a defendant in an administrative action for deficient performance related to a real estate project; or a defendant in any other related or relevant civil or criminal action.

---

## Other

Three hard copies should be provided, as well as an electronic copy of all response materials on a USB/thumb drive. All response materials must be submitted to the San Juan Capistrano City Clerk by 4:00 pm on Thursday, May 23, 2019. Additional pertinent information may be provided at the discretion of the respondent. A checklist to be completed and included in the submission follows.

## Qualifications Package Checklist

### Relevant Project Experience

- Summary of current and previous experience
  - Facility descriptions
  - Site plans
  - Photos
  - Cost and financing performance

### Transaction & Financial Data

- Summary of proposed transaction structure with the City
- Summary of proposed City compensation
- Summary of capability to source necessary capital
- Description of anticipated funding structure
- Projected revenues, expenses, and City compensation by year
- Summary of proposed capital improvements
- Substantiation of projected demand

### Project Approach

- Summary of approach and timing related to:
  - Engaging public input
  - Design approvals
  - Financing
  - Construction of Improvements (if applicable)
  - Project operation
- Examples of processes related to public engagement and project approach from other facilities operated

### References

- No less than two financial/lending references and contact information
- References and contact information for public sector elected officials and/or executive staff involved in the previous facilities identified in Relevant Project Experience (if any, up to five)

### Legal Actions

- A list and brief description of all relevant legal actions within the past ten years

### Other

- Three hard copies of all materials submitted
- One electronic copy of all materials submitted
- Acknowledgement and acceptance of the Process Integrity Guidelines
- This checklist, completed

---

## X. Evaluation Criteria

The following criteria will be used as the primary basis for evaluating operator responses throughout the selection process:

- The alignment of the respondent's proposal with the City's goals regarding the operation of the Riding Park:
  - Maintaining the Riding Park's focus as an equestrian facility
  - Optimizing the community's use of the Site, including for non-equestrian events
  - Maximizing City revenues in consideration of the City's investment in the Site
- The respondent's experience, process, and demonstrated success in engaging with the public.
- The respondent's financial capacity to operate the Riding Park, and related financial impacts upon the City.
- The respondent's demonstrated ability to operate facilities in a manner that could eliminate or minimize the City's risk while maximizing the public's return on assets and other public benefits.
- Experience of key project team members with similar facilities.

Responses will be evaluated on a weighted numerical scale for each of the above criteria. The order of presentation of the above criteria does not necessarily denote the specific importance of the same.

---

## XI. Additional Information & Resources

### City's Contact

For additional information please contact:

Wil Soholt  
Senior Vice President  
Kosmont Companies  
(310) 740-5681  
[wsoholt@kosmont.com](mailto:wsoholt@kosmont.com)

### FTP Site

Additional documents, information, and materials are available for download to invited parties. Information may be added to the FTP site at any time prior to May 9, 2019. Only parties that have requested access to the site will be notified if additional information is added. For access please submit a request to [wsoholt@kosmont.com](mailto:wsoholt@kosmont.com) (Clickable link).

Information available for download as of the circulation of this RFQ/P includes:

1. 2018 Riding Park Fee Schedule
2. Summary of Requested Equestrian Use for 2018
3. Riding Park (& Adjacent Property) Grant Deed
4. Riding Park (& Adjacent Property) Purchase & Sale Agreement
5. Rancho Mission Viejo EIR
6. Riding Park Water & Sanitary Sewer Facilities Project – Final Initial Study & Mitigated Negative Declaration (January 2017)
7. Consent Decree from Prior Litigation
8. Map of Area Horse, Multi-Use Trails

