

Services & Capabilities

Presented to Genesee County

SECTION 1

FIRM OVERVIEW



Audit

Cyber Security

Employee Benefits

IT

Strategy & Operations

Talent Development

Transactions & Corporate Finance

Tax

Wealth Management



One firm, infinite resources

Plante Moran is one of the nation's largest certified public accounting and business advisory firms. Our relationship with Plante Moran unlocks the collective power of the firm and all its affiliates, not just an individual team or office.

nearly

4,000 total staff

100+ Years serving clients

25 locations in the Midwest, Rocky Mountain Region, & internationally

Real Estate



Deep, industry-specific specialization

Comprehensive, end-to-end real estate services

Seamlessly integrated with Plante Moran

\$7B+

of public private partnership & large-scale development projects

\$8.5B+

in active construction program oversight

Millions

of square feet in real estate transactions in the last 5 years

\$2B

in incentives procured for clients



A team of true industry professionals

150+

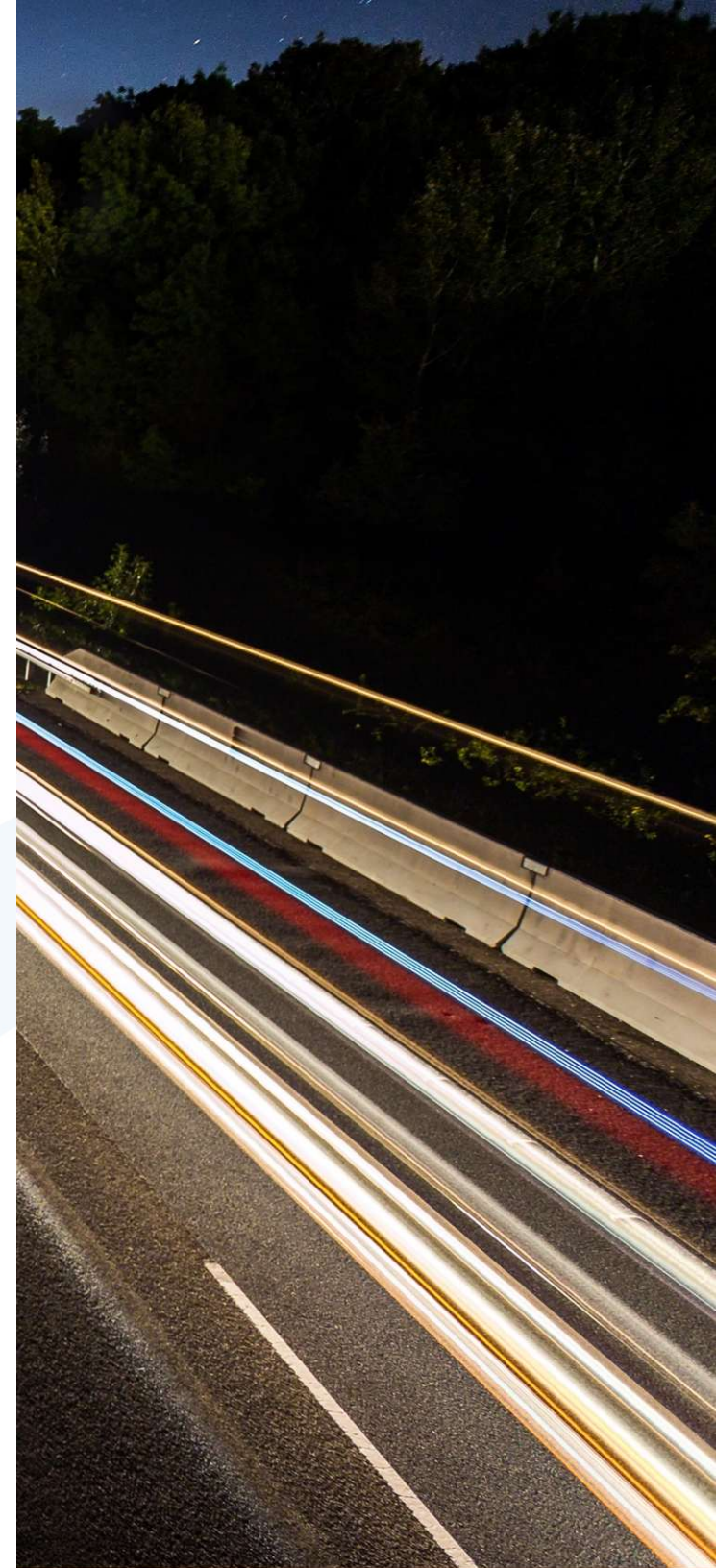
multidisciplinary staff with broad backgrounds, experience, and skills, specializing in real estate and construction

Architecture
Legal
Construction Management
Data Analysis
Development
Engineering
Entitlements
Financial Analysis

Capital Campaigns
Program Management
Public Engagement
Real Estate Investment Banking
Urban Planning
Workplace
Public Finance
Asset Management

SECTION 2

OUR TEAM



Our team



Andy Fountain

PRINCIPAL

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

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



Todd Fenton

VICE PRESIDENT

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

As a vice president at Plante Moran Realpoint (PMR), Todd brings nearly 20 years of economic development and municipal experience to the public sector team. Todd utilizes his breadth of knowledge, insight, and understanding of economic and municipal development processes to assist clients in navigating development programs at the local level.



Nicole Blocker

PRINCIPAL

nicole.blocker@plantemoran.com | (248) 603-5363

As a partner of Plante Moran Realpoint (PMR), Nicole brings more than 22 years of engineering and program management experience to the team. Known for her skill in preconstruction planning and project management, Nicole is especially adept in the areas of cost forecasting, scope evaluation project, process improvement, and team development.



Joe Asperger

SENIOR VICE PRESIDENT

Joe.Asperger@plantemoran.com | (248) 223-3064

As a Senior Vice President at Plante Moran Realpoint, Joe is a valued member of our public sector practice, providing over 25 years of architectural and owner's representative experience as a project manager and facilities director for higher education, institutional, municipal, commercial, and residential initiatives.

SECTION 3

OUR SERVICES



Questions clients ask

We bring dedicated resources, proven processes, and deep experience to guide you in making the right strategic, financial, and mission-driven decisions.

Should we lease, buy, or build?

What should the budget, scope, and schedule of the project be to ensure success?

Are we using our space effectively?

Is this project feasible given our financial realities?

How do we optimize our real estate portfolio?

Does this project qualify for incentives?

How do we manage a project and handle our regular job?

What are the risks associated with my project?

Should we relocate?

Who will facilitate the RFP process for design and construction?

Plante Moran Realpoint services

Concept through completion, we provide full-service real estate and construction advisory.

Real estate consulting

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

Real estate transactions

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

Owner's representation / development advisory

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

Real estate consulting



DEVELOPMENT SERVICES

Financial Feasibility & Underwriting
Incentive Procurement
Highest & Best Use / Development Strategy
End-to-End Development Management
Public-Private Partnerships



DATA & ECONOMICS

Market Analysis
Data Analytics & Benchmarking
Economic & Fiscal Impact
Reasonableness Opinions
Housing Needs & Affordability Strategies
Site Selection



ECONOMIC DEVELOPMENT

Large Program Coordination & Governance
Site Readiness & Attraction Support
Economic Development Policy & Strategy
Grant Compliance & Application Support

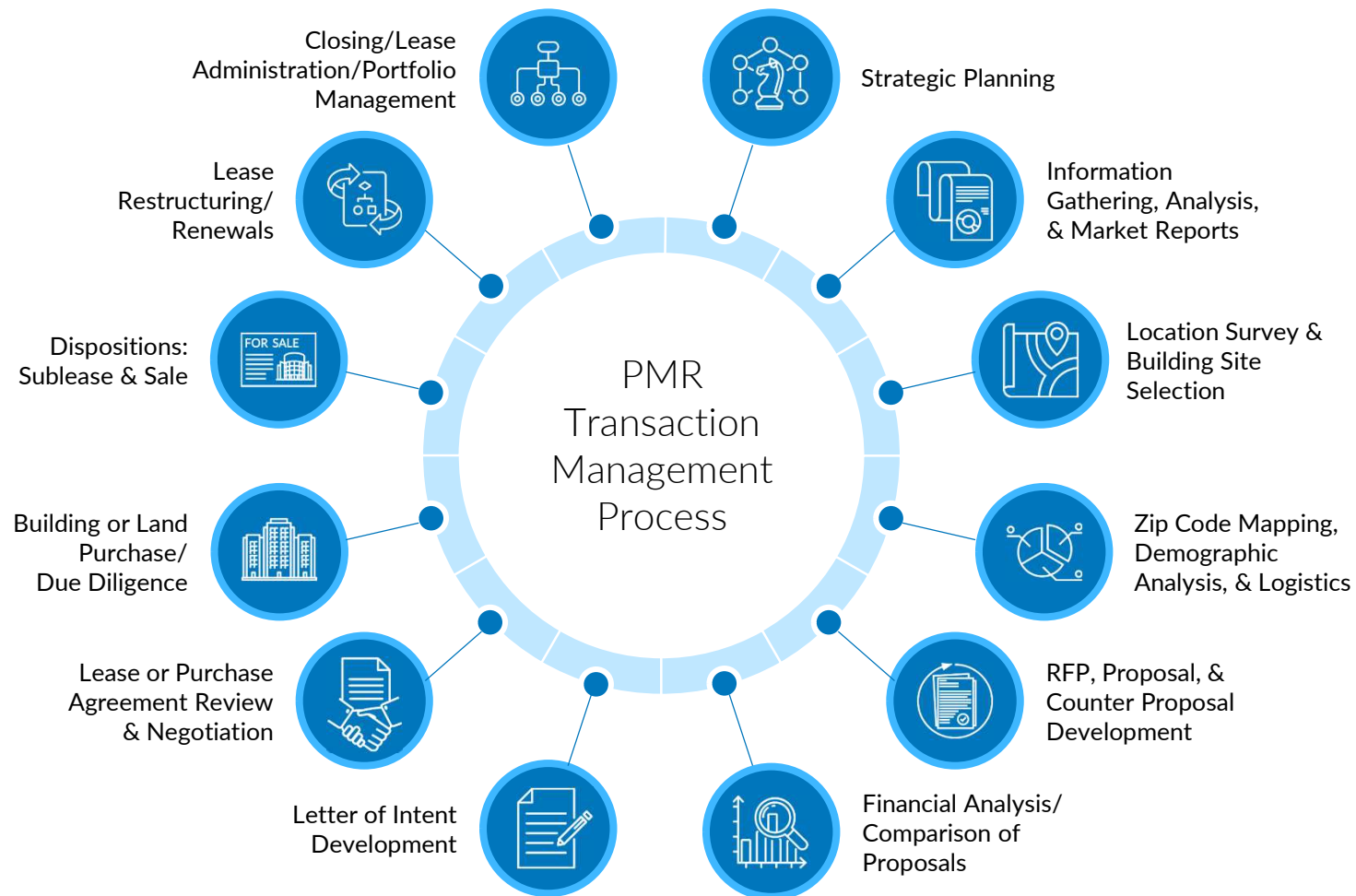


ASSET STRATEGY

Workplace & Space Programming
Occupier Portfolio Strategy
Valuations
Partner & Agreement Structuring

Transaction management

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



What is owner's representation?

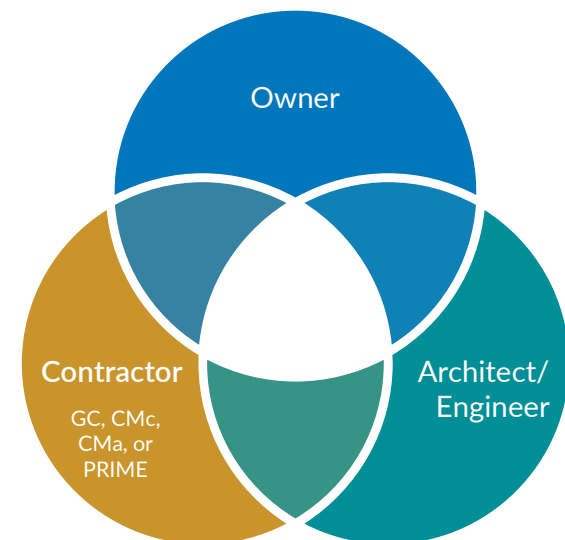
Big, Complex Capital Programs = BIG RISKS

The quality of project delivery will define both the program's cost effectiveness and the success of the technical solutions. Our multidisciplinary team brings the highest-quality resources, processes, and procedures to position you for success and assist with:

- Scheduling
- Budget and Cost Control
- Procurement of A/E, CM, & Related Vendors
- Design/Construction Review & Oversight
- Change Management
- Risk Management
- Value Engineering
- Cost Estimating

OWNER

- Strategic Planning
- Project Program
- Project Delivery Method
- Construction RFP, Bid, Award
- Construction Oversight
- Value Engineering
- Change Order Management
- Coordination of Voice, Data, & Security
- Furniture, Equipment, Security, & Technology Procurement
- Interior Designer Procurement



CONTRACTOR

- Construction of facility
- Trade management
- Scheduling
- Insurance
- Safety

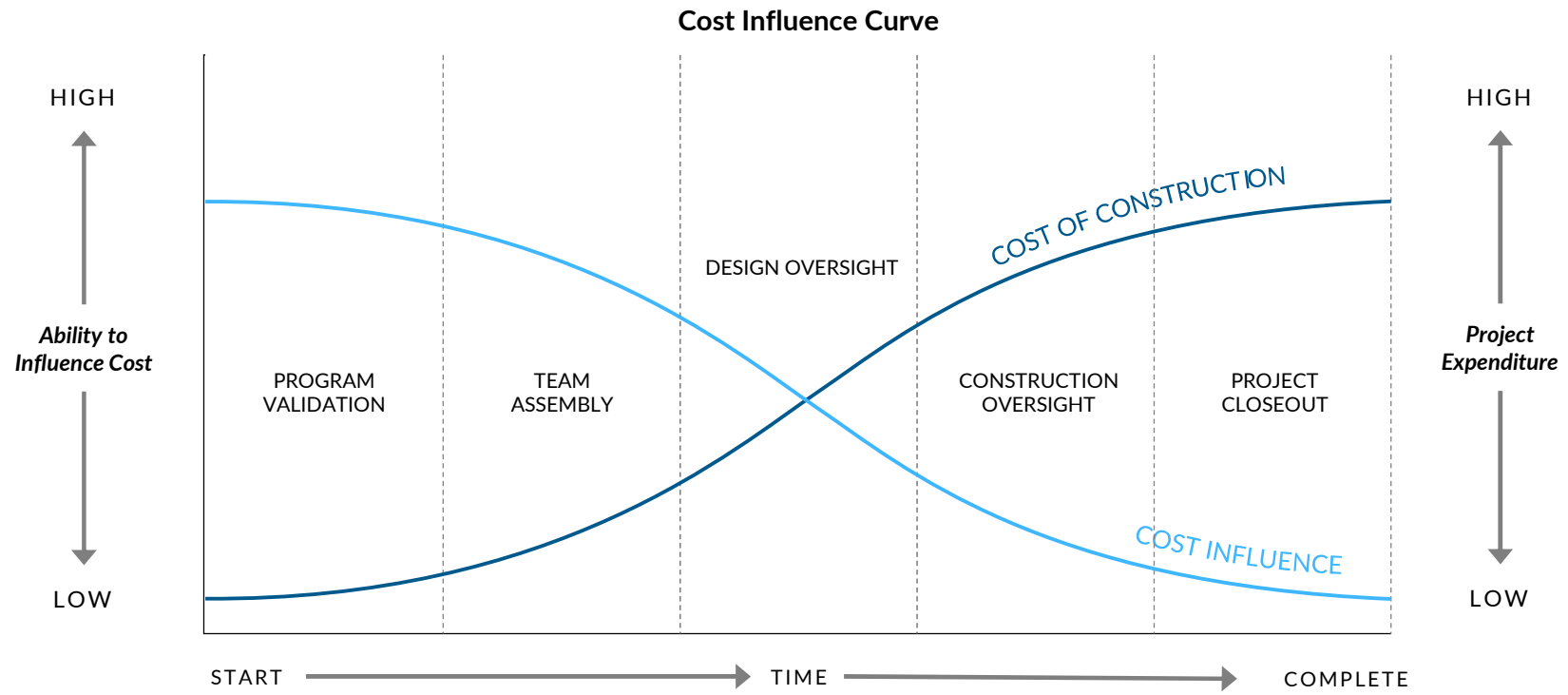
ARCHITECT/ ENGINEER

- Realizing a vision
- Design / Engineering
- Construction drawings
- Submittal review
- Design intent in construction

Owner's representation services

Our role in managing costs and protecting your investment

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



Owner's representation

Concept through completion, we solely advocate for you



Program Validation

- Strategic planning
- Finalize project scope and budget
- Cash flow modeling
- Phasing approach

**EXPECTATIONS
ALIGNMENT AMONG
STAKEHOLDERS**



Team Assembly

- Develop procurement strategy for Professional Services Required
- Prequalify Vendors
- Develop RFPs
- Contract Templates
- Facilitate Interviews
- Criteria Based Selection Process
- Award Recommendations

EXECUTED CONTRACT



Design Oversight

- Program and Design Reviews
- Contract Document Review
- Oversee, Review, & Monitor Project Budget
- Coordinate Value Engineering and Constructability Review
- Coordinate Consultants (Tech, Security, & Furniture)
- Monitor schedule & budget

COMPLETED DESIGN



Construction Oversight

- Payment Application & Invoice Processing
- Change Management
- Site Observations
- Budget Tracking
- Schedule Monitoring
- Issue and Conflict Resolution
- Continuous Communication and Reporting

PROJECT ACCEPTANCE



Project Closeout

- Inspections, Punch-List, & Start-Up
- Commissioning Coordination
- Warranty and System Training
- Architect Closeout
- Contractor Closeout
- PMR Closeout

OCCUPANCY

START OF
PROJECT

Oversee the Project (Scope ,
Budget, Schedule)

Project Cost Accounting/Reporting

PROJECT
COMPLETION

The impact of an owner's representative

Your daily to-do list

Without an owner's rep

Facilitate Project:

- Strategic planning
- Develop & monitor project program, budget, & schedule, including strategies to achieve budget alignment
- Determine delivery method
- Determine phasing
- Draft & issue RFPs
- Negotiate contracts
- Design oversight
- Meeting agendas & minutes
- Information flows
- Financial Reporting and Reconciliation
- Value engineering
- Communication between vendors
- Risk management
- Code compliance
- Change order management
- Coordination of voice, data, and security
- FF&E procurement
- Technology procurement
- Process invoices & payment applications

Coordinate with Architect/Engineer:

- Realizing a vision
- Programming
- Design/engineering
- Construction drawings
- Submittal review
- Help design intent in construction

Coordinate with Constructor (GC/CM):

- Estimating
- Construction trades bidding
- Construction of facility
- Trade coordination
- Scheduling
- Insurance /bonds
- Jobsite safety

Your daily to-do list

WITH an owner's rep

- Manage day-to-day County business
- Review OR's summary of project status & review project milestones and look ahead schedules
- OR is available to meet with Owner as needed to discuss project issues
- Sleep well at night



Return on investment

Our team can often save you two to three times our fee ... or more

We identify and track the return on investment our clients receive when utilizing our services. Our value-to-fee is directly proportionate to the fees we charge for our services and capabilities. Through judicious identification of cost savings and cost avoidance detail, as collected throughout the life of the project, we can demonstrate your cost savings as a multiple of the fee paid for our services. Our initiatives include:

- ✓ **IDENTIFYING AND NEGOTIATING FAVORABLE CONTRACTS**
- ✓ **VIGILANT MONITORING OF THE PROJECT BUDGET AND SCHEDULE TO IDENTIFY CASH FLOW**
- ✓ **MITIGATION OF PROJECT RISK WHILE OFFERING STRATEGIC VALUE-SOURCED SOLUTIONS**
- ✓ **COMPETITIVE SOLICITATION AND AWARDED OF SERVICES**
- ✓ **LEVERAGING OUR EXPERIENCE FROM THE EXECUTION OF MANY PROJECTS BOTH LOCALLY AND NATIONALLY**

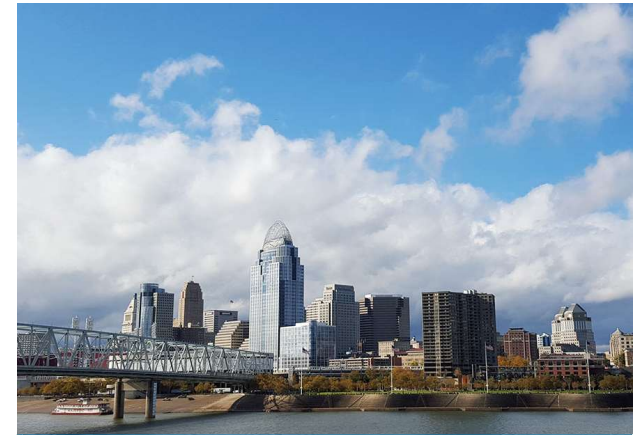
Success stories



Oakland County



Macomb County



Hamilton County



City of Royal Oak



Farmington Hills - The HAWK



Motown Museum

Government clients



Other PMR Engagements in the Flint / Genesee Area

- ✓ **Semiconductor Economic Impact Study**
- ✓ **Flint Community Schools** - \$125M MS/HS campus / Real Estate Consulting
- ✓ **Mott Foundation** - Consulting for Flint Community Schools Concept paper for \$50M school consolidation grant
- ✓ **Beecher Community Schools** - Renovation for \$20M for Beecher HS career academy
- ✓ **Flint Children's Museum TM & Consulting** - Currently advising on development services and real estate
- ✓ **Flint Center of Opportunity** - Consulting for early childhood licensing process
- ✓ **Grand Blanc** - Combined fire station and DPW facility.

FD = 16,000 SF; DPW admin. = 6,000 SF; shared space = 4,000 SF; DPW garage = 34,000 SF

Total = 60,000 SF

The PMR Difference

Experience you can count on



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

Your trusted advisor



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

Custom solutions and unmatched resources



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

Knowledge of design and construction professionals



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

Scalability & business acumen



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

We understand municipalities



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



pmrealpoint.com

3000 Town Center, Suite 100
Southfield, MI 48075
(248) 223-3500