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www.banninglibrarydistrict.org

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**BOARD OF TRUSTEES  
DIRECTOR'S REPORT**

Meeting Date: November 13, 2019  
By: Kevin Lee, District Director

Exhibit 11.1

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**TITLE:** Facility Assessment and Improvement Discussion

**DISCUSSION:**

Our library has not gone through a renovation for years. On October 23, 2019, Board Trustee Cousar, Circulation Manager Morales, and I had our Facility Improvement Committee meeting. At said meeting, we discussed about our library building's "health." It was not good. The building walls were our biggest concern. We found multiple crack lines along the building walls (see attachments). These crack lines appear to have developed over time. We believe this will get worse if we do not take any action of some sort. This is an opportunity for the Library to fix its building and expand its space, if possible.

We decided to bring in a professional to help us get an idea of what we need to do to bring our facility up to current standards and conditions, including user safety, expansion, and project management. Chris Tooker, from Trendzitions, met us on November 4, 2019. The Committee agreed that he should come before the Board to introduce himself and his company, which he agreed to.

Information about Trendzitions is attached.

**RECOMMENDATION:**

Information only. No board action required at this time.

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**BOARD ACTION**

Motion: \_\_\_\_\_ Second: \_\_\_\_\_

<input type="checkbox"/> Little	<input type="checkbox"/> Geronimo	<input type="checkbox"/> Ajigbotafe	<input type="checkbox"/> Cousar	<input type="checkbox"/> Lara
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Approved as  
Recommended

Approved as  
Amended

Other: \_\_\_\_\_

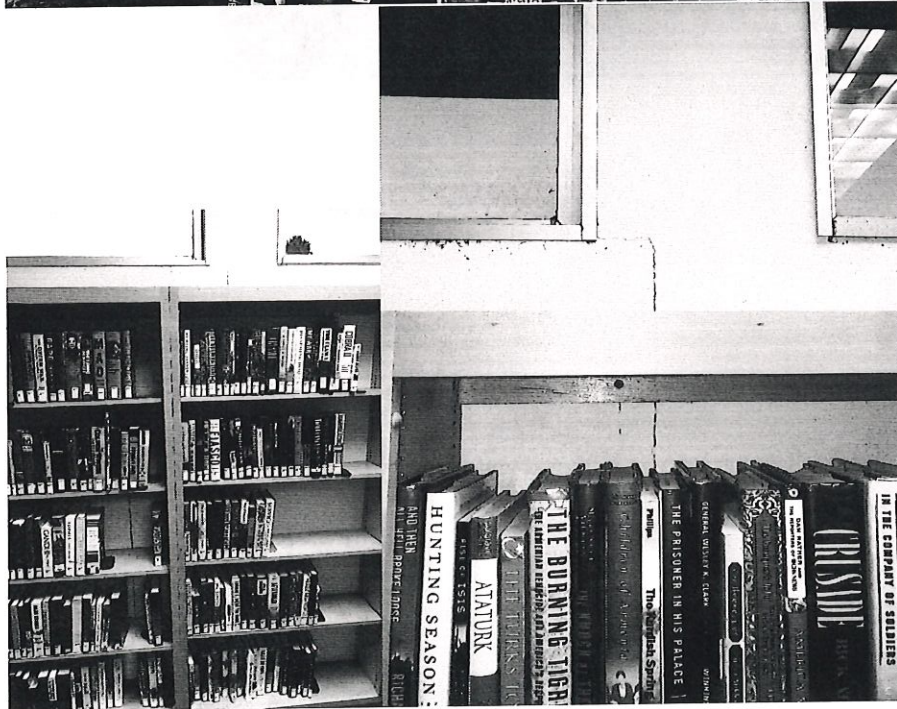
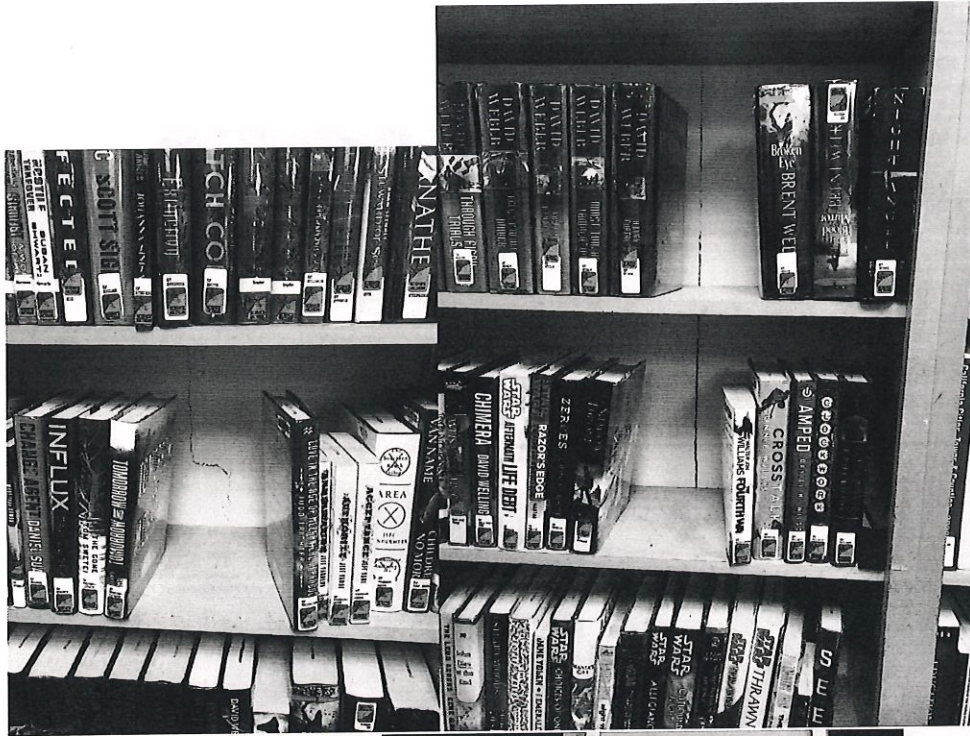
Passed, approved, and adopted on \_\_\_\_\_, 2019.

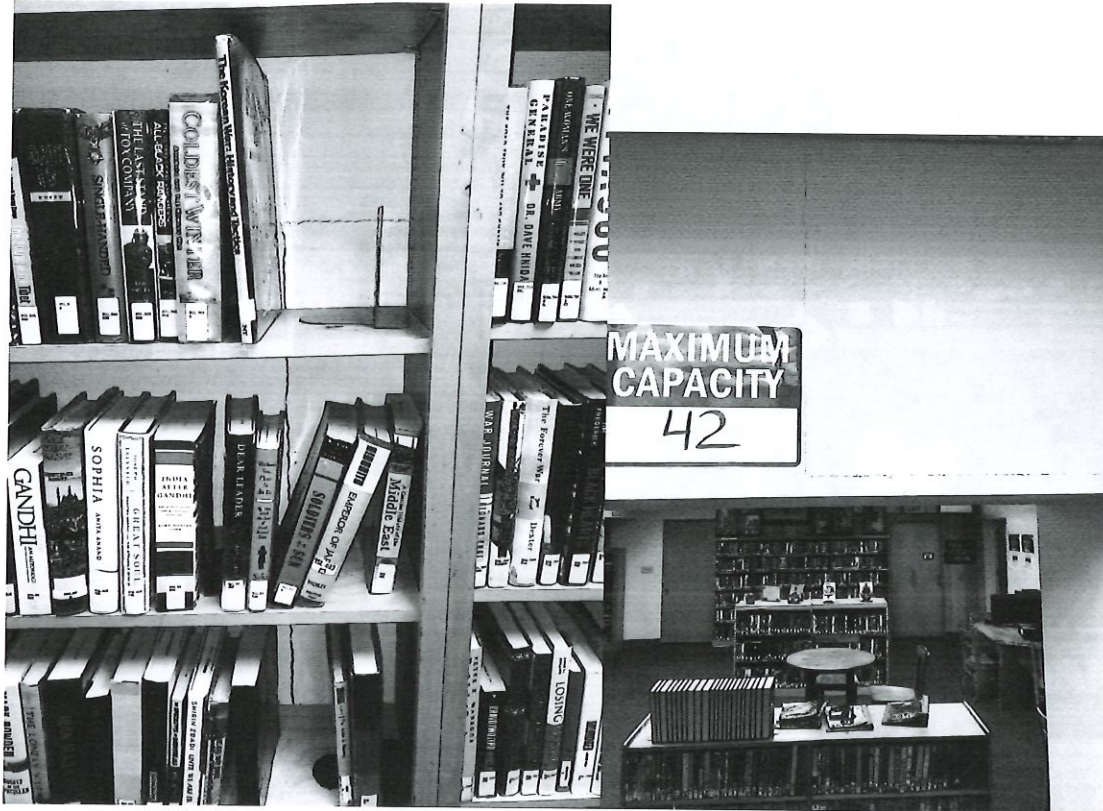
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Alex Geronimo, Board Secretary

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**Trendz•FIT™**



**FACILITY REAL ESTATE PLANNING**

**Money Back Guarantee**

- I. DELINEATE PROJECT GOALS & OBJECTIVES**  
KNOW YOUR TARGET, PRIORITIES & NEEDS
- II. DEFINE SPATIAL & SQUARE FOOTAGE NEEDS**  
KNOW YOUR SIZE TO AVOID WASTING YOUR MONEY
- III. DEVELOP BENCHMARK RELO & FF&E BUDGET**  
KNOW YOUR COSTS TO MAXIMIZE YOUR NEGOTIATIONS
- IV. DETERMINE PROJECT TIMELINE & SCHEDULE**  
KNOW YOUR TIMING; MAKE TIME YOUR FRIEND, NOT ENEMY
- V. DECIDE ON BEST-FIT ARCHITECT/SPACE  
PLANNER/DESIGNER**  
KNOW YOUR RESOURCES & MATCH THEM TO YOUR NEEDS

**BANNING LIBRARY DISTRICT**

KEVIN LEE – DISTRICT DIRECTOR

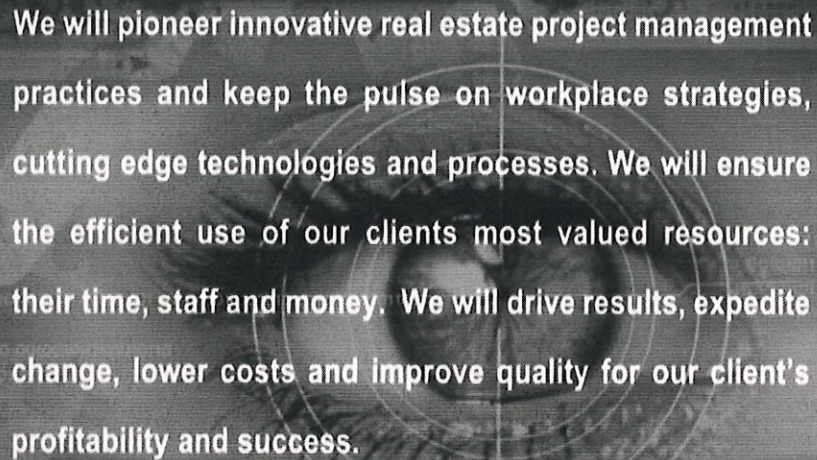
PRESENTED BY CHRIS TOOKER  
(949) 727-9100

***EXPERT PLANNING FOR NEW FACILITIES™***  
***SINCE 1986***



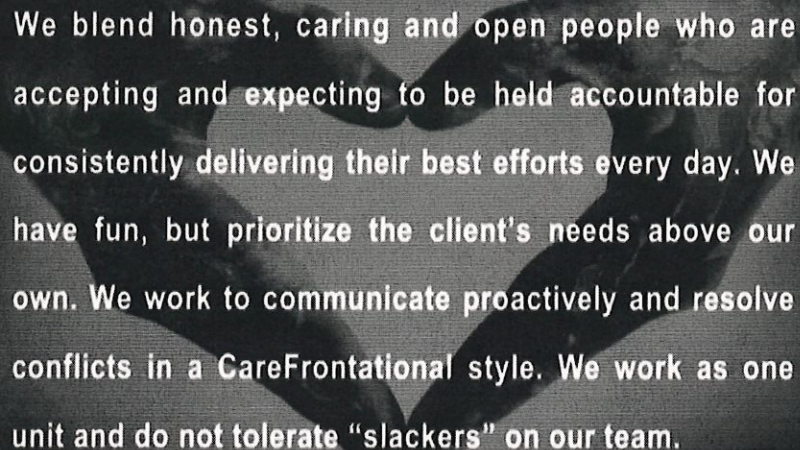


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*Expert Planning for New Facilities*  
Since 1986



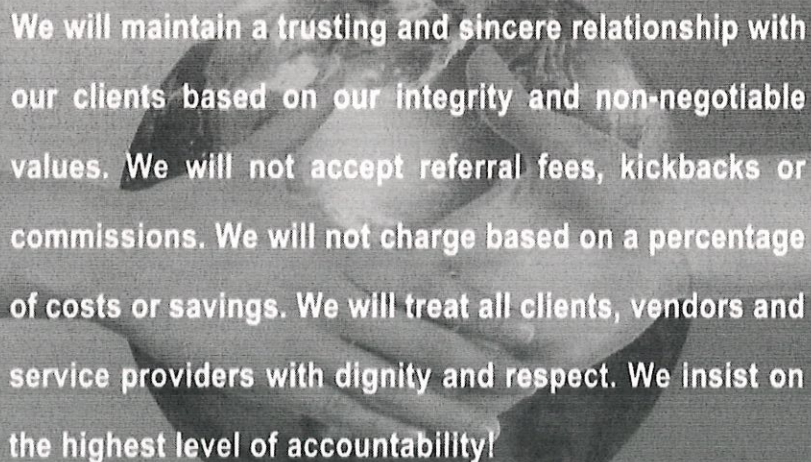
We will pioneer innovative real estate project management practices and keep the pulse on workplace strategies, cutting edge technologies and processes. We will ensure the efficient use of our clients most valued resources: their time, staff and money. We will drive results, expedite change, lower costs and improve quality for our client's profitability and success.

## Our Vision



We blend honest, caring and open people who are accepting and expecting to be held accountable for consistently delivering their best efforts every day. We have fun, but prioritize the client's needs above our own. We work to communicate proactively and resolve conflicts in a CareFrontational style. We work as one unit and do not tolerate "slackers" on our team.

## Our Culture



We will maintain a trusting and sincere relationship with our clients based on our integrity and non-negotiable values. We will not accept referral fees, kickbacks or commissions. We will not charge based on a percentage of costs or savings. We will treat all clients, vendors and service providers with dignity and respect. We insist on the highest level of accountability!

## Our Values





November 5, 2019

**BANNING LIBRARY DISTRICT**

Kevin Lee - District Director  
21 Nicolet Street  
Banning, CA 92220

Dear Kevin,

Planning a new facility project can be very time consuming, distracting and frustrating when you don't do it every day for a living. Estimating and establishing your company's requirements for space and projecting costs accurately in today's business world can be risky and somewhat overwhelming task.

However to get it right, accurate planning and timely evaluations of your options are essential to reducing cash flow surprises and a successful decision. We can provide you with support that will allow you to:

- *Focus on your core responsibilities and improve your production*
- *Expand your options with our resources and vast database*
- *Benefit from our objectivity, as we have no agenda other than yours*
- *Lower costs with our knowledge & strategies to impact costs without reducing quality*
- *Get it right the 1<sup>st</sup> time because you have the best accurate information*

Our expertise in planning new facilities has been developed since 1986 and over 1,350 successfully completed projects ensure **BANNING LIBRARY DISTRICT** receives accurate information. **Trendzitions, Inc. (TI)** will provide benchmark pricing for all costs related to your relocation.

**We provide a money back guarantee for our Trendz-Fit Planning services due to its value!**

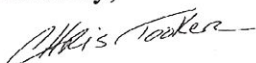
Our focus will concentrate assisting you with support that will:

- ◆ *Organize completely your company's goals & objectives to create consensus.*
- ◆ *Identify your square footage needs now and in the future for a new facility.*
- ◆ *Establish a benchmark budget & identify cost for your relocation and FF&E.*
- ◆ *Develop a project timeline to better plan accurate & realistic decisions and deadlines.*
- ◆ *Select best Architect/Space Planner*

**Trendzitions, Inc.** will ensure **BANNING LIBRARY DISTRICT** has all of the correct groundwork done, in advance. This will allow you to avoid bad decisions based on miss-information and give you better control by knowing all of your options. We will help expedite, facilitate and communicate and lead to your agenda.

We look forward to working with you.

Sincerely,



Chris Tooker  
President/CEO





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Since 1986

## TRENDZ•FIT™

# I. DELINEATE GOALS WITH 'GOTCHA' KICK OFF

## GOTCHA EXECUTIVE NEEDS ASSESSMENT KICK-OFF MEETING

### Delineate Goals and Objectives

Trendzitions, Inc. (TI) will hold OUR 90 minute trademark signature project kick off meeting with all key department heads using our "GOTCHA" approach, to learn all of your goals, objectives and concerns as they relate to your project. This meeting is vital to the project's success. It allows the team to feel involved, to voice their concerns and requirements and to set the expectation of what the transition will look like when done right.

### Identify and Consolidate the Complete Agenda

TI will provide you with a summary that will allow you to prioritize and crystallize your needs and wants. This tool will create the synergy needed for aligning individual agendas with corporate goals and objectives and ensure everyone is on the same page!

#### WE'VE GOTCHA COVERED!!

In planning your facility, clarify and identify your goals, objectives and vision within it the best ways to get excellent results for your project. Your help will allow us to organize, prioritize and evaluate what are the most important, more important or less important items on your agenda, as you address your project requirements. Thank you for your participation!

**GOALS:** Please elaborate on what you want to accomplish in this Transition (your or our vision) and how, when you was finished, you will know we did it right!

**OBJECTIVES:** What would the "WOW" effect look like when you get there? Please be more specific in identifying certain requirements or desires you have for your new facility.

**TIMING:** Are there any timing issues that we should be aware of?

**CONCERNS:** What are some of the concerns you have about this project/new facility?

**HESITATIONS:** What are your fears with regards to your project and/or new facility?

**ABSOLUTES:** What are the non-negotiable, hard boundaries, or must-haves issues?



### Vanguard New Facility—GOTCHA SUMMARY 6/19/2013



Please review our draft of your goals, concerns and expectations that you shared with us about your desired outcomes for your new facility and adjust anything you would like us to add!

#### GOALS:

- ◆ Create an efficient, effective & thriving work environment where people are proud & want to work & produce results
- ◆ Smooth and seamless relocation process without damages equipment or downtime
- ◆ Secure facility so it complies with TSA/Customs Trade Partnership Against Terrorism requirements
- ◆ Maintain professional, positive and team centered mentality, collaboration and communication
- ◆ Select vendors with high standards and that propose quality services and products
- ◆ Utilize a quality and certified vendor for cabling to eliminate any network cabling concerns
- ◆ Open communication with managers + staff, Dept. heads must professionally guide their teams through this & maintain focus

#### OBJECTIVES:

- ◆ Provide secure storage (payroll), and adequate storage for filing; need file cabinets in A/R, 20 cabinets in Shelly's area
- ◆ Purchase economical, but quality modular workstations with a focus on ergonomics, monitors, keyboards and seating
- ◆ Create adequate lunchroom w/refrigerator & 4 microwaves & a printer room to help reduce noise & chatter general work areas
- ◆ Purchase several white boards or floating glass board to share among departments
- ◆ Create staging & paper mgmt. area for A/P & Cash Flow; secure area for checks & a general/shared access file area
- ◆ Provide adequate meeting rooms and locked work space for IT Dept., May need assistance on scanning/destrorying documents
- ◆ Create a workspace layout that adheres to department and personnel needs
- ◆ Create proper lighting, HVAC, meeting rooms, and create proper adjacencies
- ◆ IT needs hoteling stations for national resources and requires (2) cubes to have a higher height than the standard
- ◆ IT needs work lab (verify if security is needed) to assemble and work on desktops, hardware, storage, etc.
- ◆ Create and implement a more organized filing system for storage and consider a higher quality vendor for off-site storage

#### TIMING: AVOID the following department timing issues, probably aim for 3rd weekend of the month

- ◆ Payroll: avoid payroll week/ General Ledger avoid 1st-10th of month/ Global Finance avoid 10th-20th of month
- ◆ A/P= 1st-10th, last bus. day of month/Agent Accounting avoid 1st week of month, last 3 days of the month
- ◆ IT= last week of month and first 4 working days of the month
- ◆ MPLS circuit need (90 days lead time)

#### CONCERNS:

- ◆ Limited access to record storage (technology), lack of storage space, may need to consider off-site storage
- ◆ Functional furniture (doors that close in desk, 50% not working)
- ◆ IT will need more support resources to help with relocation if it extends beyond 1 week.
- ◆ Appearance of lack of equality regarding space with designated offices and/or size of cubes; people need to take responsibility for their respective departments attitudes and outlook on this project

#### HESITATIONS:

- ◆ People getting sidetracked from their regular responsibilities
- ◆ Fear of finger pointing and need to have a back-up plan in place to provide confidence in our ability/process

#### ABSOLUTES:

- ◆ 100% functional & running on Monday from 6am-6:30pm with network connectivity (especially A/R and A/P)
- ◆ Dates are non-negotiable for Payroll/General Ledger, Global Finance dates are somewhat negotiable
- ◆ Financial and global service files securing relocation/IT needs 90 days for new circuits





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## II. DEFINE SPATIAL REQUIREMENTS

### DEVELOP NEEDS ASSESSMENT

TI Consultants will review the current spatial needs and help to define your space requirements and office standards. A programming report after meeting with key personnel and management will be produced. This will help to define early the spatial requirements for offices, open areas, department sizes and common areas. This will include discussions about traffic flow, department adjacencies, special equipment or furniture needs for both public and private areas. **Identifying the spatial requirements early allows for proper building size selection and will allow for planned growth.**

**TRENDZ•FIT™**  
SPATIAL REQUIREMENTS SURVEY

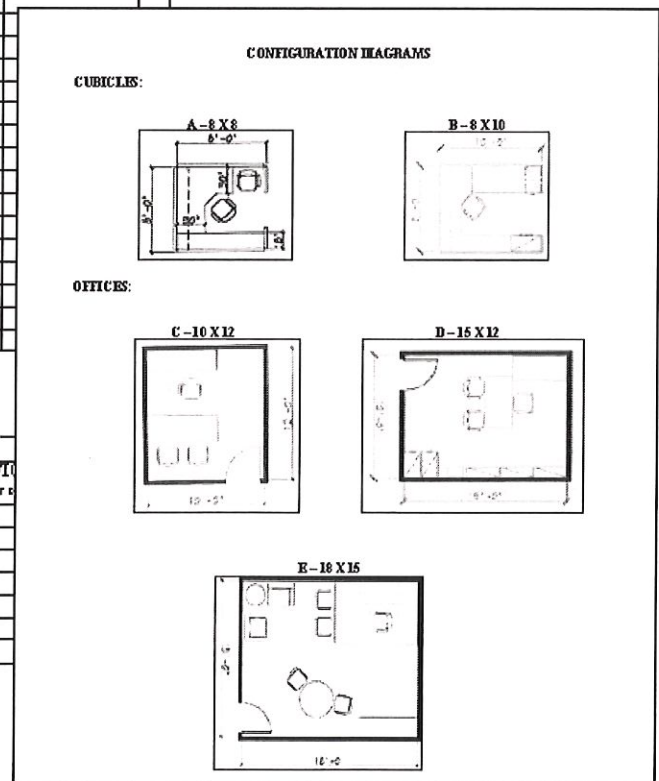
**I. ORGANIZATION**

	DEPARTMENT	CURRENT # OF STAFF	POTURE YEAR 1	POTURE YEAR 3	POTURE YEAR 5	ADJACENCY (#1/#2)
1	Executive					
2	Marketing					
3	Finance					
4	Accounting					
5	Legal					
6	Sales					
7	Customer Service					
8	Human Resources					
9	Information Systems					
10	Administration					
11	Research/Development					
12	Engineering					
13	Facility Maintenance					
14	Production					
15	Quality Assurance					
16	Distribution					
17	Customer Support					
18						
19						
20						

**II. DEPARTMENTAL INFORMATION**

DEPARTMENT: \_\_\_\_\_

STAFF MEMBER	JOB LEVEL/FUNCTION	OFFICE(O) CUBICLE(C)	COMPT (Refer to)













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### III. DEVELOP BENCHMARK BUDGET

#### IDENTIFY COSTS ASSOCIATED WITH RELOCATION & FURNITURE, FIXTURES & EQUIPMENT

**Trendzitions, Inc. (TI)** will quickly and accurately compile benchmark pricing associated with successfully and completely setting up your entire operation at the new location. We will identify all areas that will incur costs in order to relocate the entire company operationally. **Missing costs will be discovered and defined.**

**TI will address several hundred areas where costs can impact your business as a result of a relocation!**

Our research will include all benchmark pricing relating to:

- ◆ *Telephones Systems, Voice Mail, Internet & Telco Lines*
- ◆ *Computers System Relocations, Local Area Network Relocation Support*
- ◆ *Data & Telephone Cabling*
- ◆ *Security, Intrusion, Access Control & CCTV systems, Audio/Visual systems, Presentation equipment, Video Conferencing & Training systems*
- ◆ *Modular & Freestanding furniture systems*
- ◆ *The Physical Relocation Office Moves, Warehouse and Inventories*
- ◆ *Printing Moving Announcements, Business Cards & Forms*
- ◆ *Signs, Banners, Directories & Temporary Signs, Employee name plates, etc.*
- ◆ *Racking, Shelving, Mezzanines, Etc.*
- ◆ *Machinery, Riggers, Labs, Etc.*

*"It is our goal to educate you on the possible and probable costs associated with accomplishing your vision for the facility. Please consider the costs represented are based on our best efforts to match you with products and services that will meet your needs.*

*As is often the case, the overall costs are often more than expected and can create some financial discomfort and concern on how to best to manage and address these costs. Help has arrived, and we have lots of experience, resources and ideas on to best manage, plan for, defer, mitigate and amortize these costs to make it more affordable to accomplish the new facility that you can afford."*

- Chris Tooker

#### MAKE FULLY INFORMED FINANCIAL DECISIONS

Decisions will be made and you will avoid the negative financial effects of surprise costs.

Know your costs early so you have complete knowledge and expectations about your costs so you can create options!

		Client Name					
		BANK OF AMERICA					
		1/1/2006					
<p>Listed are Benchmark estimates for major cost items provided to assist you in determining the costs for your new facility. The Bank is relocating to 8447 square feet (administrative/loan offices) and 3596 square feet for the branch, with three conference rooms and initial staffing of 11 private offices, 8 staff in cubicles, one receptionist and two IT staff in shared office in administrative/loan space. The branch will have three private offices, a conference room, vault room, kitchen area and two tellers. Growth space in admin/loan office includes one private office and four in cubicles. Tenant improvement expenses for admin/loan space will include all improvements in excess of building standard as defined by Landlord, as set forth in design development pricing approved by Bank. Ten percent of tenant allowance is generally budgeted for change orders. However, in this case, inasmuch as all costs over building standard will be borne by Bank, we are including an amount of \$175,000 as an out-of-estimate. It is our intent in this Benchmark Budget to show maximum dollars before value engineering, bid processes or other cost-reducing procedures.</p>							
25 Employees Projected Relocation Costs		12,043					
5 Employees Projected Growth							
Square Feet of Office Space							
Item	Project Category	Budgeted Cost	Final cost	Brief Description			
<b>Real Estate/Business Building &amp; Construction/Tenant Improvement</b>							
	Trendzitions Real Estate Planning Services	1 x 2,500	2,500	2,500	Dev. Budget & Time line To Be Determined		
	Security Deposit	1 x 32,395	32,395	32,395	Cost to the client above standard expenditures (Includes AWA-3, \$6270)		
	Client Cost for Tenant Improvements	1 x 175,000	175,000	98,180	Client Fees		
	Space Planning/ Design Fees	1 x 13,375	12,000	13,775	Barris Macmillan		
	Interior Design Fees		0		Manage proj. and const. Mfgs. 5875/month for 4 months		
	Trendzitions Project Mgmt./Const. Mgmt.	3 x 5,875	17,625	23,500			
<b>SUBTOTAL</b>			<b>239,520</b>	<b>168,350</b>			
<b>Physical Relocation</b>							
	Physical Van Line Charges/ Insurance	1 x 15,000	15,000	6,932	3 Van 20 Men Including Drive Time (Total bid amount, to be finalized)		
	Materials Charges	2 x 2	375		10 persons + common areas		
	Packing Charges	10 x 25	250		2 men to pack @ \$25/HR for 10 hours (5 HRS Each)		
	Delivery Charges	2 x 100	200		Drop off & pick-up of boxes		
	Plant relocation service	1 x 500	500		Professional service to relocate potted plants/trees (Allment based on \$30/hour)		
	Desktop computer disconnect/reconnect		0	1,041	Technical service to reconnect desktop units and test at destination		
	Trendzitions Move Management	1 x 8,950	8,950	8,950	Vendor Selection & the move planning		
	Trendzitions On-Site Implementations	30 x 125	3,750	3,750	Estimate of 30 hours for 2 Project Managers		
<b>SUBTOTAL</b>			<b>28,725</b>	<b>18,623</b>			

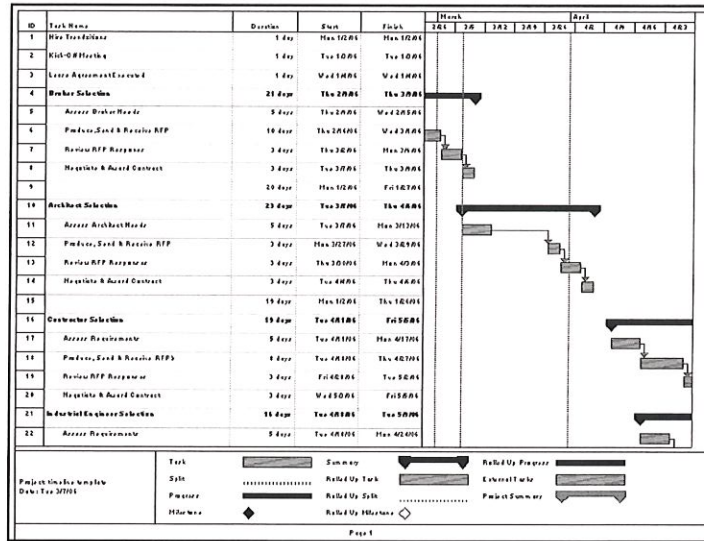


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## IV. DETERMINE PROJECT TIMELINE

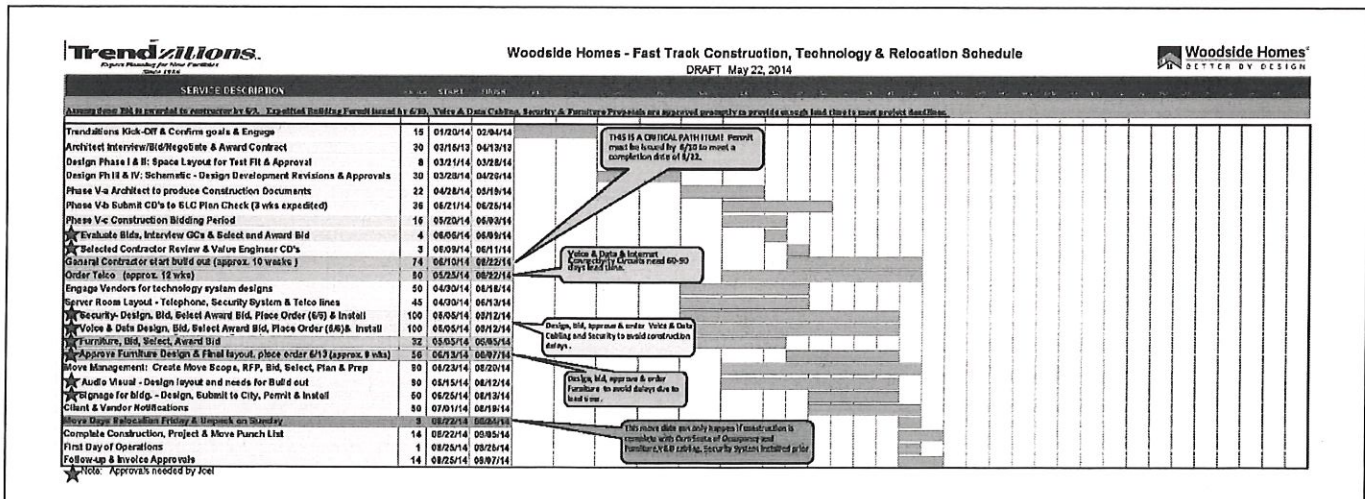
### ORGANIZE & PRIORITIZE YOUR FOCUS & DECISIONS

*TI* will organize and prioritize all the key items associated with your plans for expanding and relocating your business. These items will include the Real Estate search process, lease negotiations, space planning, development of construction documents, as well as construction of the new space, ordering and installation lead times for new products and technologies. We will help to prepare you for an aggressive game plan so that your expectations will match the realities of the transition process. **This allows for the correct timing to address all facets of your business. This will also allow *BANNING LIBRARY DISTRICT management team* to concentrate your energies in the most time effective fashion and prioritize the use of your time against key critical decisions.**



### DISCOVER SEQUENTIAL & PARALLEL TASKS

*TI* will review your business priorities and help identify what key decisions need to take place and when.







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# V. DECIDE ON BEST-FIT ARCHITECT/SPACE PLANNER

## PROFILE ARCHITECT/SPACE PLANNER

Once your programming is complete, it is time to find a qualified Architect/Space Planner who can take your spatial requirements, and fit those requirements into the plans for your new facility.

**Trendzitions**  
10000  
Company Name  
Representative  
Re: Client Name  
Via Fax (949)  
Appointment Date

Dear Mr. Representative:

In an effort to assist you in preparing for our meeting with Company Name, I have compiled the following list of items we would like to review. The interview time should take approximately 30-45 minutes. Explain your process, examples and experience relevant for a project of this sort.

**GEOGRAPHIC FOCUS**  
Provide a list of clients in the areas we are considering that you have represented similar in size and/or type of user. Explain how this would allow you to meet our architectural requirements.

**POTENTIAL CONFLICT OF INTEREST**  
If you or your firm represents a project being considered how would this conflict be addressed?

**COMPETITION**  
How do you differentiate yourself from the other firms aside from the stated selection criteria?

**TEAM STRUCTURE AND OPERATIONS**  
Who would be our point of contact and responsible for the overall account mgmt?  
Explain in detail the transaction process for an account of this size.

**NEGOTIATION STYLE AND APPROACH**  
What level of concessions, flexibility have you gotten for similar type projects?  
What building and construction documentation, interior design, space planning and architectural improvements could you get us?  
Based on the current market, what could we expect and how would you facilitate this package.

**EXPERIENCE**  
What are the qualifications/experience of team members who would be assigned to our account?  
Please provide three references that may be contacted as part of the decision process.

**FIRM OPERATION**  
Describe the structure and organization of your architectural firm, specifically where the corporate services/client representation professionals reside.

**RESEARCH CAPABILITIES**  
What technical capabilities do you have as they relate to research, market data collection, financial analysis, communication and reporting?

**SAMPLE WORK**  
Please present samples of the following items of previous work that would illustrate your particular methodologies, creativity, capabilities or processes. All client names will be confidential.  
♦ Market survey or research report typically used before initiating a site survey.  
♦ Architectural Request for Proposal

**Trendzitions**  
10000  
**Burkert Fluid Control Systems**  
Architect Selection Summary

Trendzitions has been retained to represent Burkert Fluid Control Systems in the selection of an architect for their new facility which is yet to be determined. We developed our Request for Proposal (RFP) based on our conversations and your listing priorities. We have based our recommendation on 1) Value - ability to "get" what Burkert Fluid Control Systems is looking for and produce the high-tech facility that is correct. 2) Experience - Client's participation, and 3) Reputation and responsiveness of firm.

We invited a total of 4 competitors to participate in the bid process. Each company was asked to provide pricing on the basis of work required. This fit of the 3 short-listed firms (2 domestic, 1 survey of company resources and managers to verify programming and delivery requirements, as well as design, look, and feel, a new facility: Design Drawings, a color palette with standard finishes, Construction documents, Field verification of trends list. Included in the scope described an assessment of the market in getting approximate package floor coverings for each facility level, based on existing conditions. We have also included the interview scores on a scale of 1-10.

Below we have listed the four competitors that have responded, and have indicated their suitability for your project. We conclude with our recommendation.

<b>Burkert and Associates</b>	Total Fees: \$102,200 - \$105,000
Contract: Retail/Light	Engineered Drawings: \$16,000 - \$71,000
Telephone: (919) 961-4317	Structural Engineer - If needed (Out/In/Out): \$8,000 - \$3,000
	TOTAL: \$157,200 - \$189,000
	Interview Score: 7

Burkert and Associates were founded by Robert Burkert & Associates. Beginning in 1957 and has been in continuous operation for over 30 years. The firm has completed a variety of commercial, industrial, institutional, religious, hospital and special use projects. An internal division was formed in 1980. This group provides programming, space planning, interior design, furniture selection and specification, interior selection and interior project coordination.

Interior Architects:	Total Fees: \$76,700
Contract: Retail/Residential	Engineered Drawings: \$17,000
Telephone: (714) 337-3418	Structural Engineer - If needed (Out/In/Out): \$6,000
	TOTAL: \$99,700
	Interview Score: 10

Interior Architects has fourteen offices worldwide, and a total of 350 employees. IA has been in business for 21 years. Trendzitions has worked with IA on several projects as well and found them to be a solid partner in the architectural and project management phases of each project.

<b>Mengel and Company</b>	Total Fees: \$79,400 - \$79,400
Contract: Every Smith	Engineered Drawings: Included
Telephone: (714) 832-3333	Structural Engineer - If needed (Out/In/Out): \$0
	TOTAL: \$79,400 - \$79,400
	Interview Score: 9

Reigs & Associates has two offices in Southern California, and a total of 15 architects/project managers. We have worked on several projects with them, and have always found them to do a good job.

Shimmer & Agate & Associates have been removed from the bidding due to the fact that they have adequate or no relevant experience for this project for the Warehouse, production and shipping portion.

**Recommendation**  
The best team and value for Burkert based on your needs and criteria we recommend Interior Architects.

Architect Recommendation:	_____	Date:	_____
Architect Selection:	_____	Date:	_____

## INTERVIEW EXPERIENCE

**TI** will evaluate the Architectural/Space Planning community to select the best one for your requirements. We will conduct an interview process that will allow each firm to showcase their talent, demonstrate their unique skills and approach to projects. We will be comparing the different styles, resources and services offered in this competitive environment. This process reveals their talent, creativity and connections that best suits your needs.

We will help provide insights during the interview processes that allow you to focus on the talent and fit first. Once we have completed the interview process and ranked the candidates we will review the costs for each firm for your review.





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## DECIDE ON BEST-FIT ARCHITECT/SPACE PLANNER (CONT'D)

### ARCHITECT/SPACE PLANNER SCOPE & COST COMPARISON

**TI** will prepare a Request for Proposal, distribute to qualified bidders, analyze bids and prepare an analysis and summary with a recommendation as to the Architect/Space Planners that you should interview. **This will save you time by having qualified bids analyzed by the evaluation process you established.**

**TI** will work with the company or individual selected to make sure that your adjacency requirements are met, as well as your timing requirements. The selected Architect/Space Planner will provide preliminary space plan drawings and tissue layouts for the review, critique and modifications of management and department heads. **This will ensure that the floor plans created by the Architect/Space Planner will meet your actual functionality requirements. It is much easier to move a wall to meet your specific needs at this stage of the game before you start the Tenant Improvement Process.**

### Burkert Fluid Control Systems Architect Selection Summary

Trendzitions has been retained to represent Burkert Fluid Control Systems in the selection of an architect for their new facility which is yet to be determined. We developed our Request for Proposal (RFP) based on our conversations and your buying priorities. We have based our recommendations on 1) Value - ability to "get" what Burkert Fluid Control Systems is looking for and produce the high-tech look and feel that is desired, 2) Personnel: Cost/Competence, and 3) Experience and responsiveness of team.

We invited a total of 4 companies to participate in the bid process. Each company was asked to provide pricing as the scope of work required. Ten firms of the 3 short-listed firms provided. Review of company qualifications and managers to confirm programming and adjacency requirements as well as design look and feel of new facility. Design Drawings, a color palette with finished photos, Construction documents, Field verification and Punch List included in the scope of work as a necessity of the bid. This is getting approximately per square foot cost requirements for each facility viewed, based on existing conditions. We have also included the interview notes on a scale of 1-10.

Below we have listed the four companies that have responded, and have included their suitability for your project. We conclude with our recommendations.

<b>Bardens and Associates</b> Contact: Ronald Lilly Telephone: (949) 931-1317	<b>Total Fees: \$183,200 - \$168,900</b> <b>Engineered Drawings: \$46,000 - \$74,000</b> <b>Structural Engineer - If needed (to be paid): \$9,000 - \$12,000</b> <b>TOTAL: \$157,200 - \$159,900</b> <b>Interview Score: 7</b>
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Bardens and Associates were founded by Robert Bardens & Associates, beginning in 1967 and has been in continuous practice for more than 35 years. The firm has completed a variety of commercial, industrial, recreational, religious, university and special use projects. An interior division was founded in 1992. The group provides programming, space planning, interior design, furniture selection and specification, artwork selection and interior graphic coordination.

<b>Interior Architects:</b> Contact: Brian Koslosky Telephone: (714) 437-3438	<b>Total Fees: \$76,783</b> <b>Engineered Drawings: \$17,650</b> <b>Structural Engineer - If needed (to be paid): N/A</b> <b>TOTAL: \$93,783</b> <b>Interview Score: 10</b>
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Interior Architects has fourteen offices worldwide, and a total of 350 employees. IA has been in business for 21 years. Trendzitions has worked with IA on several projects as well and found them to be a solid performer in the architectural and project management phases of each project.

<b>Rengel and Company</b> Contact: Terry Smith Telephone: (714) 932-3333	<b>Total Fees: \$79,400 - \$78,600</b> <b>Engineered Drawings: Included</b> <b>Structural Engineer - If needed (to be paid): N/A</b> <b>TOTAL: \$79,400 - \$78,600</b> <b>Interview Score: 9</b>
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Rengel & Associates has two offices in Southern California, and a total of 15 architect/project managers. We have worked on several projects with them, and have always found them to do a good job.

Shimamura & Algers & Associates have been removed from the list due to the fact that did not have adequate or relevant experience for this project for the Warehouse, production and shipping portion.

**Recommendation:**  
The best team and value for Burkert based on your needs and criteria we recommend Interior Architects.

Architect Recommended	Date	Architect Selected	Date

Trendzitions Expert Planning for New Facilities Since 1986		Burkert Fluid Control Systems Architect/Space Planner Analysis 10/5/2007												Trendzitions Ltd. of Illinois			
Vendor Name & Address	Profile	Total Fees (\$K)	Struct. Programmer (\$K/yr)	Design (\$K/yr)	Project Fees (\$K)	Construction or other (\$K/yr)	Interior (\$K/yr)	Other (\$K/yr)	Field (\$K/yr)	Other (\$K/yr)	Other (\$K/yr)	Other (\$K/yr)	Other (\$K/yr)	Other (\$K/yr)	Other (\$K/yr)	Other (\$K/yr)	Other (\$K/yr)
<b>Bardens and Associates</b> Ronald Lilly 5205 Campus Drive Newport Beach, CA 92660 (949) 931-1317	Yrs. in Business: 38 # of Locations: 1 # of Staff: 14 Principal: H. Ron Lilly Project Manager:	\$12,000	\$1,600	\$10,500	\$8,500	\$5,000	\$6,600	\$10,000	\$3,600	\$1,000	OC \$6,400 Lakland Valley \$9,100	\$3,300	\$4,400	\$103,200	\$46,000	\$8,000	\$157,200
<b>Interior Architects</b> Brian Koslosky 108C Brentwood, #105 Costa Mesa, CA 92625-3352 (714) 437-3438	Yrs. in Business: 19 # of Locations: 16 # of Staff: 184 Principal: Brian Koslosky Proj. Mgr: Sharon Medina	\$16,400	\$2,785	\$13,200	\$4,600	\$1,840	\$2,785	\$25,500	\$920	\$2,785	OC \$44,210 \$11,520 Inland Valley \$44,220 \$11,520	Inc.	Inc.	\$46,535	\$17,000	N/A	\$104,535
<b>Rengel and Company</b> Terry Smith 293 So. Camino Real Tustin, CA 92780-3035 (714) 932-3333	Yrs. in Business: 25 # of Locations: 3 # of Staff: 13 Principal: Rick Rengel Proj. Mgr: AJ	\$7,400	\$2,500	\$5,000	\$1,500	Inc.	\$3,500	\$52,000	\$1,000	\$1,500	OC \$3,800 Inland Valley \$4,800	Inc.	N/A	\$76,400	Inc.	N/A	\$76,400

Vendor Recommended

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Vendor Selected

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Client Approval

### SELECTION OF THE INTERIOR DESIGNER

Often times the talent of a uniquely focused Interior Designer brings significant value to a project look and feel. **TI** will address this need and include the engagement of this key individual on your team if it is deemed appropriate. This can be an individual within the Architect firm or may be a different firm or individual.





# BANNING LIBRARY DISTRICT

## SCHEDULE OF SERVICES

**BANNING LIBRARY DISTRICT** and **Trendzitions, Inc. (TI)** agree that **TI** will coordinate, consult and implement each of the services checked below as described in our Proposal Service Descriptions. **TI** will provide for the research, evaluation and coordination of the services checked below.

All services include the **Trendzitions** GOTCHA Executive Needs Assessment Kick-Off Meeting

### **TRENDZ·FIT™**

#### **REAL ESTATE PLANNING SERVICES**

- DELINEATE PROJECT GOALS & OBJECTIVES (GOTCHA)
- DEFINE SPATIAL SQUARE FOOTAGE NEEDS
- DEVELOP BENCHMARK RELOCATION & FF&E BUDGET
- PRODUCE PROJECT SCHEDULE & TIMELINE
- INTERVIEW/BID/SELECT BEST-FIT REAL ESTATE BROKER
- PRE-LEASE TRANSACTION SUPPORT
- BID, INTERVIEW & SELECT ARCHITECT/SPACE PLANNER
- INTERVIEW/BID/SELECT BEST-FIT INDUSTRIAL ENGINEER

### **TRENDZ·PLAN™**

#### **PRE-LEASE DESIGN & TRANSACTION SUPPORT**

- REVIEW & TOUR BUILDING SHORT LIST
- SELECT, DISTRIBUTE RFP, INTERVIEW & BID ANALYSIS
- PROVIDE PROJ. TIMING/PLNG MANAGE & COORD TEST FITS
- REVIEW & DEVELOP TI LETTER SCOPE

#### **PRE-CONSTRUCTION SERVICES**

- MANAGE/COORDINATE ARCHITECT/MEP CDS
- SELECT APPROVED GCs & DISTRIBUTE RFP
- BID, INTERVIEW & SELECT GENERAL CONTRACTOR

### **TRENDZ·BUILD™ CONSTRUCTION MANAGEMENT**

- DEVELOP SCOPE, DISTRIBUTE RFP & PROVIDE BID ANALYSIS
- BID, INTERVIEW & SELECT GENERAL CONTRACTOR
- MANAGE BUILD OUT & COMPLETE PUNCH-LIST
- PROVIDE VALUE ENGINEERING & LEADERSHIP
- MANAGE BUILD OUT, PROJECT MTGS, CHANGES/TIMING
- MONITOR BUDGET, CHANGE ORDERS & PERMITTING

### **TRENDZ·PROJECT™ VENDOR PROJECT MANAGEMENT**

- INITIATE KICK-OFF & MANAGE PROJECT MEETINGS
- LEAD/MANAGE VENDOR/CLIENT COMMUNICATIONS
- NOTIFY & COORDINATE SUPPLIERS/SERVICES
- MANAGE PROJECT TIMELINES AND SCHEDULES
- DEVELOP PROJECT TASK FORCE
- WEEKLY ON-SITE ADMINISTRATIVE SUPPORT

### **TRENDZ·TECH™ TECHNOLOGY & PRODUCT CONSULTING & PROCUREMENT**

#### **TELECOMMUNICATIONS CONSULTING**

- BID & PROCURE TELEPHONE SYSTEM & VOICE MAIL.
- BID & PROCURE VOICE/DATA & PAGING CABLING
- BID & PROCURE VOICE & DATA TELCO LINES
- RELOCATE EXISTING SYSTEM & SELECT SERVICE CO.

#### **TECHNOLOGY, OFFICE & WAREHOUSE PRODUCTS**

- PROCURE MODULAR & FREE STANDING FURNITURE
- DESIGN, BID & IMPLEMENT A/V SYSTEMS
- DESIGN & BID SECURITY SYSTEM
- BID/PROCURE & COORDINATE WAREHOUSE RACKING

### **TRENDZ·RELO™ FACILITY RELOCATION MANAGEMENT**

- DEVELOP WRITTEN SCOPE OF WORK (RFP)
- WALK THRU VENDORS FOR RELOCATION BIDS
- PRODUCE MOVE COST COMPARISON
- CREATE RELOCATION SCHEDULE
- INVENTORY FREESTANDING FURNITURE & EQUIPMENT
- DETERMINE & PLAN LOCATION OF FILING CABINETS
- PROVIDE EMPLOYEE EXT. LISTS & PERSONALIZED LABELS
- PREPARE DESTINATION MAPPING OF FLOOR PLANS
- COORDINATE PRE MOVE MEETINGS
- PROVIDE ON SITE MOVE DAY SUPERVISION
- DISTRIBUTE POST MOVE ALERTS & FOLLOW-UP
- LIQUIDATE EXCESS FURNITURE & EQUIPMENT
- APPROVE, CORRECT & PROCESS INVOICES

THIS DOCUMENT COMBINED WITH OUR PROPOSAL SERVICE DESCRIPTIONS, STRUCTURE OF FEES, CONFIDENTIALITY AND SERVICE AGREEMENTS ALONG WITH OUR TERMS & CONDITIONS, FORM OUR COMPLETE ENTIRE AGREEMENT.





**TRENDZ•FIT™**

**REAL ESTATE PLANNING SERVICES  
STRUCTURE OF FEES**

Listed below is the breakdown of your needs that *TI* had defined with our service fees. *TI* assistance will give you maximum control of this process and will also allow you to maximize your resources of time and money.

**DELINATE PROJECT GOALS & OBJECTIVES**

- ◆ Conduct our trademark GOTCHA project kick off meeting to capture all critical issues
- ◆ Produce a 1 page summary that reflects a management consensus of desired outcomes

**DEFINE SPATIAL REQUIREMENTS**

- ◆ Interview dept. heads/management to establish current staff needs & future growth
- ◆ Develop standard sizes, offices, cubicles & common areas needs for fit, function & flow
- ◆ Create/revise spreadsheet summary of head count plus load & circulation factors

**DEVELOP BENCHMARK BUDGET**

- ◆ Establish benchmark pricing for all relocation & furniture, fixture & equip. costs
- ◆ Provide a Spread Sheet for Review, Revisions & Final Consensus

**DETERMINE PROJECT TIMELINE**

- ◆ Organize Schedule, Timing, Priorities and Desired Deadlines
- ◆ Identify critical milestones for key management decisions

**SELECT ARCHITECT/SPACE PLANNER/INTERIOR DESIGNER**

- ◆ Distribute RFPs and Prepare Analysis & Summary
- ◆ Select, Interview 3 Finalists, Negotiate & Award Contract

**FEE FOR SERVICES PACKAGE TOTAL**

**\*\$14,850.00**

*\*TI* will be reimbursed for all out of pocket expenses: Mileage, blueprints, etc.

This is an agreement for a packaged fee for services and, in the event of a project cancellation beyond the control of *TI*, a buyout of the contract for 35% of the projected contract amount may be exercised. This document combined with our Proposal Service Descriptions, Schedule of Services, Confidentiality and Service Agreements along with our Terms & Conditions form our complete entire agreement.





## SERVICES AGREEMENT

Trendzitions, Inc. (*TI*) and **BANNING LIBRARY DISTRICT** (set forth below) enter into this Agreement. *TI* will agree to provide consulting, management and coordination of listed services and **BANNING LIBRARY DISTRICT** agrees to pay *TI* for these services. These services are listed in the *TI* Schedule of Services and described by our service descriptions and authorized by **BANNING LIBRARY DISTRICT**.

### BANNING LIBRARY DISTRICT

21 W. NICOLET STREET	BANNING	CA	92220
CURRENT ADDRESS	CITY	STATE	ZIP
NEW LOCATION ADDRESS	CITY	STATE	ZIP

Total <b>Trendzitions, Inc.</b> <i>Fee for Services</i>	<b><u>\$ 14,850.00</u></b>
50 % Non-Refundable Retainer	<b><u>\$ 7,425.00</u></b>
50 % Balance Due Upon Presentation of Deliverables	<b><u>\$ 7,425.00</u></b>

**Payment Terms & Reimbursements:** Payments are due upon receipt and are considered late 10 days after the invoice date. After 10 days a 5% late fee will be assessed each month. All expenses will be billed at cost plus 15%. All payments shall be made without claim, reduction or offset for any purpose whatsoever. The vendor and contractor "community" shall be liable for damages resulting in their lack of performance. We do not profit from or make any warranty on their work or performance. (The cost for mileage will be billed at 55¢ per mile).

**Client Requirements:** Client is expected to provide an accurate organization chart identifying all current employees by department and manager. Additionally a current phone extension list is needed. Inaccurate information from client may result in additional charges.

**Entire Agreement:** The provisions contained in this agreement constitute the entire agreement by and between **BANNING LIBRARY DISTRICT** and *TI* and all-prior discussions or agreements, whether oral or written are incorporated within. *TI* is not bound by any representations or inducements not set forth herein. This agreement, our Proposal Service Descriptions, Schedule of Services, Structure of Fees, Service Agreement, Confidentiality Agreement and along with our Terms and Conditions constitute the entire Agreement, unless modified in writing and signed by **BANNING LIBRARY DISTRICT** and an authorized Officer of *TI*.

BANNING LIBRARY DISTRICT

DATE

Trendzitions

DATE





## TERMS & CONDITIONS

**General:** This Agreement may not be amended except in writing, and signed by a duly authorized officer for both parties. Any attempt to assign or transfer any of the rights, duties or obligations herein shall render such attempted assignment or transfer null and void. The laws of this state shall in all respects govern this Agreement. The parties hereby agree that any dispute relating to the services stated hereunder shall be subject to the courts of jurisdiction for the State of California.

**Procedures:** *Trendzitions* shall control and direct all communication information and vendor pricing as it is *Trendzitions'* responsibility to compile, evaluate, compare and provide said information. *BANNING LIBRARY DISTRICT* further agrees to release *Trendzitions* from all performance obligations and provide payment in full upon demand if *BANNING LIBRARY DISTRICT* neglects to adhere or interferes with these procedures as deemed by an officer of *Trendzitions*.

**Limitation of Liability:** In the performance of this Agreement, *Trendzitions* shall be liable only for the coordination, management and consulting services. Further, no liability will arise if the performances of such services are prevented by declared government emergencies, civil disturbance, strikes or other causes beyond *Trendzitions'* control. *BANNING LIBRARY DISTRICT* agrees that neither *Trendzitions* nor its agents or employees shall be liable for any loss or damage to the *BANNING LIBRARY DISTRICT's* agents or employees arising in connection with their performance. Our financial liability is limited to the amount paid for said services. The financial liabilities will stay with the selected vendors and their specific performance.

In no event shall *Trendzitions*, its agents or employees, be liable for indirect, incidental or consequential damages included without limitation, any loss of business, damage or expense directly or indirectly arising from contractor's inability to deliver products or services as required by the *BANNING LIBRARY DISTRICT*. This responsibility shall be that of the vendor, supplier or contractor.

**Indemnification:** *Trendzitions* and *BANNING LIBRARY DISTRICT* shall each indemnify and hold each other harmless from any and all claims, actions, suits, proceedings, costs, expenses, damages, demands, and liabilities, including attorney's fees claimed by any person, contractor, or organization to the extent caused by the other party related to its obligations or actions under this agreement.

\_\_\_\_\_  
*BANNING LIBRARY DISTRICT*

\_\_\_\_\_  
DATE

\_\_\_\_\_  
*Trendzitions*

\_\_\_\_\_  
DATE





## CONFIDENTIALITY AGREEMENT

**Client Authorization:** Trendzitions, Inc. (*TI*) will be our authorized management and consulting firm. *TI* is authorized to notify various services including, but not limited to, telephone service, gas, electricity, and ordering new service transfers or disconnects on **BANNING LIBRARY DISTRICT** behalf. They may release any necessary information to complete the implementation of these services. **BANNING LIBRARY DISTRICT** shall have full financial responsibility for all utility fees, deposits, and closing bills incurred during said projects.

**Non-Duplication & Disclosure:** This agreement is designed to protect all documents produced and distributed by *TI* and to prevent their unauthorized use of distribution for any purpose. The enclosed information is confidential and proprietary to *TI*. Its creation and production are for the exclusive use of our clients or prospective clients. In addition, the client shall not publish, duplicate, distribute or reuse *TI* documents, procedures, or materials in any manner, for any purpose without the written consent of *TI*. **BANNING LIBRARY DISTRICT** will hold and maintain in the strictest confidence all documents in this proposal, and the provisions of this agreement shall survive the termination of this agreement. **BANNING LIBRARY DISTRICT's** duty to hold confidential information in confidence shall remain in effect until the confidential information no longer qualifies as a trade secret or until *TI* sends written notice releasing **BANNING LIBRARY DISTRICT** from this agreement, whichever occurs first.

**Confidentiality:** All *TI* documentation is trade secrets of *TI*. These documents are not to be copied or distributed to any parties other than those listed in our proposal. **BANNING LIBRARY DISTRICT** promises to keep confidential, not copy or distribute any such *TI* materials, samples, or documents.

No *TI* documents may be released to any party other than those listed, without *TI's* prior written approval and *TI's* non-disclosure agreement signed in advance by the party to receive *TI's* documents. In the event **BANNING LIBRARY DISTRICT** disclosed any of *TI's* documents, **BANNING LIBRARY DISTRICT** agrees that *TI* will be entitled to equitable and injunctive relief, without bond, in addition to any other remedy to which *TI* may be entitled. The prevailing party in any lawsuit or arbitration shall be entitled to attorney's fees.

**Non-Solicitations:** It is understood that *TI's* clients and our employees are not to be solicited by our clients or vendors. A tremendous amount of time, training, and unique proprietary methods are used to develop these relationships, and a great deal of expense is incurred in securing both clients and employees.

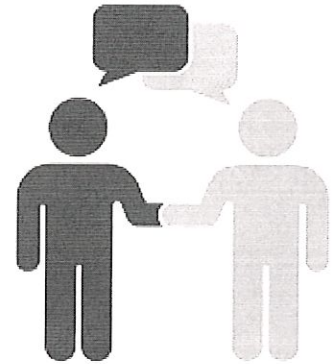
This document combined with our Proposal Service Descriptions, Schedule of Services, Structure of Fees and Services Agreements along with our Term and Conditions form our complete and entire agreement, unless modified in writing and signed by **BANNING LIBRARY DISTRICT** and an authorized Officer of *TI*.



**We appreciate your business** and strive to provide you with an excellent experience. If for any reason you are not satisfied, please contact us immediately so we can adjust and improve our service.



**Your Feedback** is very important to us. We need your feedback to get it right and stay on track.



If you feel that we deserved anything less than 5 stars, please notify us right away so that we may resolve any issues you may have.



Thank you in advance.

