

From: **Lisa Marechal** lisa@neodesignstudio.com
Subject: Fwd: Today's Meeting
Date: October 5, 2015 at 12:16 PM
To: camille.trummer@portlandoregon.gov
Cc: Margie.Sollinger@portlandoregon.gov
Bcc: **David Dibo** david@dibopartners.com



Camille:

In one of our previous conversations, you informed me that there is a procedure that you have to follow and that discussing the matter with the PDC was the first step. Our discussions have revolved around weekly meetings you have with Patrick Quinton. An aide to his office is not the same as addressing him directly and I am asking that you take this step. I would like to honor the procedure you informed me that you need to follow. This matter has very broad reaching ripples in the pond that are far beyond what an aide or assistant can reasonably comprehend.

The forwarded email below was the result of my October 2014 inquiry regarding assistance in remedying my circumstances with the PDC. Between the Fall 2014 and this Fall 2015, I have spoken with approximately 6 different attorneys. As I have mentioned previously, I am at the point of appealing to the Mayor's office because ALL LEGAL OPTIONS HAVE BEEN EXHAUSTED. I will repeat that I have been told that the statute of limitations has passed for a legal claim of unjust enrichment (this is the legal definition for the type of actions I have experienced) and I have no lien rights because there was no written agreement. I was asked to work without one as "circumstances were too fluid" to structure an agreement.

If you can arrange to forward my materials DIRECTLY to Patrick Quinton today, a cursory review of PDC records from the 2004 + 2005 Headquarters Hotel RFP effort will substantiate all of the points made in my letter to David Mortenson which is dated November 2014 and in the front of the package of bound materials left with you in late August. Mr Quinton should be able to ascertain these facts pretty quickly. I am willing to meet with him to discuss this matter further, to supply additional records as well as provide contact information for a half dozen people with 1st hand knowledge of how this project actually came to be that are willing to speak frankly on my behalf. Additionally, there are 3 letters in the back of the package from a few of these individuals.

The public subsidies involved in this matter are as follows: The PDC is supplying an 8 million dollar grant and probably some land because the city owns portions of the site the hotel is slated to be constructed on. Additionally, there is a 12 million dollar grant coming from the state. Most significant of all, public bonds are going to be sold to assist the development team in obtaining favorable financing. The sum total of public subsidy comes to over 60 million dollars. As a resident and taxpayer, I am outraged that after taking credit for my work, the development team will be granted these large financial incentives to implement this project. Mortenson stands to be paid over 13 million in development fees and approximately another 35 million in profits from construction of this hotel all of which, is a direct result of my efforts.

This is the most egregious, unjust thing that has ever happened to me. Given that my records clearly substantiate my claim, that I have gone through large sums of money to further this development, lost my business partner of over 20 years directly from the actions of the development team resulting in me having to shut down operations in Portland, I am seeking assistance for a fair settlement. Without some form of discreet intervention providing me with leverage, I have no hope of a fair resolution with the development team. If I am able to settle this matter quietly behind closed doors, it will allow the project to move forward to its successful conclusion also enabling me to re-establish my business and get on with my life. I believe this to be in the best interest of all of the government agencies involved in trying to get this project built, fair to me and also in the best interest of the the city's residents as a whole.

This hotel will bring abundant economic prosperity to the city through good paying jobs for it's residents, increased tourism which will benefit many small businesses and additional convention business for the convention center allowing it to operate more profitably. Airing my issues publicly in the press will cause many problems creating the potential for additional delays, the souring of public opinion regarding the financial incentives to help make the project happen and provide a great deal of additional fodder for the legal opposition to getting the hotel built. I am pleading with you to understand the broader issues and see this through as previously outlined in our conversations.

Thank You,

Lisa Marechal
(775) 360 - 4977 cell

Begin forwarded message:

From: "Bowers, Irene" <BowersI@pdc.us>
Subject: Today's Meeting
Date: October 17, 2014 at 1:10:01 PM PDT
To: "lisa@neodesignstudio.com" <lisa@neodesignstudio.com>
Cc: "Betcone, Bob" <BetconeB@pdc.us>, "Abuaf, Lisa (PDC)" <AbuafL@pdc.us>

October 17, 2014

TO: Lisa Marechal

RE: I have consulted with PDC's legal consul and I have been advised by them not to have additional contact with you. Should you wish to have future contact with the Portland Development Commission please direct your inquires to our General Consul, Eric Iverson cc'd above.

Sincerely,

Irene Bowers
Senior Project Manager, OCC URA
Urban Development Department
Portland Development Commission
222 NW Fifth Avenue
Portland, OR 97209
P 503 823.2419
[E BowersI@pdc.us](mailto:E.BowersI@pdc.us)
www.pdc.us

Neo design studio^{INC}

INTERIOR ARCHITECTURE & DESIGN

August 17th, 2015

Dear Mayor Hales:

I am writing you regarding the Portland Headquarters Hotel. As you are the individual who oversees the Portland Development Commission, I am appealing to your sense of fairness to withhold the 8 million dollar public subsidy to be provided through this agency to the development team until the matter within this letter has been resolved.

As you are aware, this project has been in the making for more than a decade. In it's current incarnation, the headquarters hotel would not have materialized without my efforts. The attached letter to David Mortenson dated November 2014 immediately following this note describes the history of my involvement.

The bound pages following the letter provide an abbreviated sampling of backup documents relating to the sequence of events and correspondence between the Schlesinger Companies, Mortenson and my firm, which began late in 2003 when I first approached Barry Schlesinger to join a development team I was in the process of forming.

I am a small business owner who has been trying to resolve this matter through a variety of channels since 2012 to no avail. The development team has taken full credit for the concepts, alternate site, team assembly efforts and equity, all of which I initiated during the 2004 RFP process. Please see the 4th paragraph from the top on the last page of the letter to David Mortenson for a succinct description of the work product used without compensation due me.

As a leader in the initial development team assembly stage, Barry Schlesinger promised me compensation on numerous occasions. Please see page 1 paragraph 5 of the Mortenson letter and the enclosed letter from David Dibo, which is the 3rd from last page of the bound brochure. To date, there has been none.

We did submit for the interior design of the project in March 2015. I would have considered the matter settled with an award for this piece of the project work. Mortenson selected a Chicago firm earlier this summer. No one on our team was ever notified of the project being awarded to another interiors firm. We learned of this decision just a few weeks ago after numerous calls over the course of the summer to follow up on our proposal that went unanswered. Though disappointed we were not awarded the interiors, this is Mortenson's choice.

I am now appealing to you for assistance to remedy this matter because I have exhausted every possible method of fair resolution available to me. The actions of the parties involved have clearly demonstrated an unwillingness to negotiate.

You are a busy man with a lot on your plate. I have copied Dan Saltzman who oversees the Bureau of Development Services. Relevant additional documentation is available should that be needed to further substantiate this claim.

Let me be clear in stating that I do not expect anyone to negotiate or resolve the matter on my behalf. I am capable of negotiating on my own but lack leverage. I have had an Oregon based business and contributed to the tax base for twenty - five years now that has created a portion of the subsidy enabling this project to move forward. I will not back away without payment for my work.

Whether one is for or against the headquarters hotel, it really is a badly needed project for the city, the convention center and the close in East side of town. I would prefer to settle the matter discreetly allowing it to move forward without any controversial press or additional delays.

Withholding subsidy from this project will provide the needed leverage for the development team to negotiate fairly with my company to reach a settlement. My resources and options have been completely exhausted over the past few years. Thank you for your prompt attention to this important and time sensitive matter.

Regards,



Lisa Marechal
Neo Design Studio

cc: Dan Saltzman

Neo design studio^{INC}

INTERIOR ARCHITECTURE & DESIGN

David Mortenson
Mortenson
700 Meadow Lane North
Minneapolis, MN 55422

November 18th, 2014

Dear Mr Mortenson:

It has been stated to me that you are a fair man who cares about your company's reputation and legacy. I am writing you regarding the Portland Headquarters Hotel project, which Mortenson is involved with in both a development and a GC capacity.

It is my activities during the 2004/2005 RFP process for this same project, which laid the groundwork establishing the winning strategy for your company. Here is an abbreviated recap of the most pertinent points relating to this matter:

- In 2004, I approached Barry Schlesinger to be a local development partner for the Jones Lang LaSalle team forming to respond to the RFP for a Portland headquarters hotel. Barry had no knowledge of this opportunity until I contacted him, had no land holdings in the area and had only a small amount of experience developing one hotel site on the West side of town.
- In ensuing discussions about strategy for pursuit of the RFP, Barry brought up an alternate site to me that had previously been considered by the Portland Development Commission for this same project. After taking a look at the site, I asked him if he had the resources to acquire it? It was obviously a far better location for a large new construction hotel also affording the opportunity to create a destination mixed - use environment.
- Barry told me he did but requested that I take on tasks for the RFP response process, (which he would normally have been responsible for) to free up his time to negotiate acquisition of the alternate site, as it was actually many smaller parcels owned by different entities. The activities I undertook included a search for equity, aspects of the written proposal response and team formation. A fee was agreed to of 300K.
- During discussions about hotel flags + management companies, I made the point to most team members that Hyatt had deep pockets and if they liked a deal, would contribute far more equity than any other hotel operator as they are both owners as well as operators of hotels. At that time Hyatt had very little presence in the Pacific Northwest and I surmised would be quite interested in this project.
- In 2004, I made the initial contact with Hyatt learning that they were already on another team. During ensuing discussions, I proposed we submit without a hotel operator offering to discuss the best candidates with the PDC. Scott Miller - with Hyatt at the time - suggested we reconnect after the RFP was awarded should our team prevail. Following this exchange, our team submitted without a hotel operator. This turned out to be a strategy the PDC did not understand.
- During this time I also reached out to Mortenson following some research + consultation with colleagues. Part of the reason for this decision was the existence of the development arm of your company. At this time, Jones Lang LaSalle filled the hotel development lead role. However, Barry was in the process of acquiring a very large, dynamic site and part of my responsibility was to find equity. Though the focus was on the hotel, I was aware there would be many additional opportunities requiring a development partner on this same site. Barry had informed me his goal was land ownership and he made it clear he was looking to partner rather than developing the site himself.

- My involvement with Barry and this site continued long after headquarters hotel project was awarded to the Garfield Traub team in 2005. I forwarded articles, made additional introductions and recommendations to Barry. He had informed me that I would be paid win or lose in the RFP process because he would wind up with a fantastic site. Of course, the collapse of Wall Street halted all development for several years affecting Barry's circumstances quite adversely.

- In 2010, the headquarters hotel effort with the Garfield Traub team was cancelled which, would shortly create a new opportunity. Barry reached out to the public agencies, entered into discussions with Hyatt and also continued his dialog with Mortenson.

In late 2011, I met with Barry to catch up on recent developments as the economy was coming out of hibernation and METRO had begun discussions about issuing another RFP for this project. He informed me at this time that Mortenson would take the lead development role in the upcoming effort and suggested I reach out to your organization once again.

In 2004, it had been agreed that I would be compensated 300K for my pre - development activities as well my firm providing interior design services for the project. By this juncture in late 2011, I was OK with securing the interiors work and waiving the 300K as the economic downturn had obviously taken quite a toll on everyone.

- Occasionally, as a matter of habit I copied Rodger Benson in email correspondence to Barry. Rodger Benson and he had also remained in contact with one another. One of the items forwarded to both of them in January 2012 was an article about properties being developed with two flags and one hotel operator. Later this same year, this concept became one of the alternates included for consideration the 2012 RFP response.

Because I had a relationship with Rodger, I reached out to him. We met in January 2012 in Kirkland to discuss the project. Rodger strongly endorsed our continued involvement with this project, as he was aware of some of my past activities and my role in bringing this project in the door for Mortenson. He assured me that he would see to it that there would be a role for us on this project. Colleagues providing additional assurances that we would be invited to this dance had brought Mortenson's reputation to my attention.

Additionally, Rodger later confirmed by email and in word that he had spoken with Tom Lander. They both concurred we would be given due consideration at the appropriate time. As a result of these assurances, I began to flush out a seasoned interiors team for this project. Between January 2012 and Spring 2014 my activities focused on covering all of the important issues relating to the interiors for this important project.

These activities included flying a senior individual that had extensive Hyatt experience into town on several occasions to discuss taking a lead role for the firm, meeting with other firms around the country to explore the prospect of partnering, meetings + discussions with members of your team here in Portland and dialog with Rodger about flying into Minneapolis to meet with ESG. I also spent time touring Hyatt properties, collecting, reading and sharing information regarding Hyatt standards to fully prepare for meaningful dialog with the development + operational team.

In an email exchange with a colleague in early 2014, I learned that Barry Schlesinger had begun advocating the hiring of a local firm we frequently competed against. I was informed that he owed them money and was hoping that the interiors commission might relieve him of some financial obligation. It was at this juncture, that I began to realize that my trust in the parties involved in this development deal might be seriously misplaced.

That promised meeting with Tom Lander never happened. Not only did the meeting never occur but also there was never a single direct exchange with Tom. No questions were ever asked regarding our firm's capabilities or any facet of the anticipated schedule, budgets, etc.

I was informed that a decision was made to work with a Dallas, Texas firm without any consideration what so ever of our firm for this project. The recent letter enclosed references yet another firm and also deflects responsibility for decisions regarding the design team to Hyatt. At one point, a great deal of importance had been placed upon Hyatt experience. I spent months covering this concern in my preparation for the onset of this project. I note that the Dallas, Texas firm has no Hyatt experience whatsoever.

Rodger delivered this distressing news in an email to me in the Spring of 2014. I am certain he felt terrible and could not muster the stamina to deal with relaying Tom's decision to me directly after all of the assurances that had been made to our firm. In an attempt to soften the blow, he offered to make it up to us with other projects, as you will see from one of the enclosed emails.

A few months later, over lunch in Kirkland, I asked him to paper this offer to provide some certainty to us. Verbal assurances of any sort had quite clearly become unreliable coming from anyone on the development team. Rodger informed me this would have to come from the development arm of the company and said he would discuss this matter with Tom. The last communiqué I have from Rodger is the October 2014 letter. I know him well enough to read between the lines that this was a message he was directed to deliver.

Up until this point in time we had enjoyed an amicable relationship, had shared information regarding other projects and discussed teaming for additional opportunities independent of his offer. I had looked forward to continuing a friendly collaborative relationship with Mortenson, had recommended your company to a few clients and passed along information regarding possible upcoming project work in the region to Rodger. The October 2014 letter destroyed my faith in Mortenson's credibility as well as my ten year relationship with a man that I had come to respect and trust.

In reviewing the 2012 RFP response submitted by Mortenson, I observe the same site, the same project, the same local partner, the same hotel operator, the involvement of both Mortenson as well as Jones Lang LaSalle and one of the alternates in the RFP response being the dual flag sole hotel operator option. As stated in the October 2014 letter, Mortenson's position is that this is a separate opportunity.

My activities regarding this project span more than a decade. I have expended an enormous amount of time that has contributed quite substantially to everyone's benefit except that of my firm. Additionally, I have a large tab of unreimbursed expenses incurred on behalf of this project. Many team members are aware of parts of this story but it is not likely that anyone knows the entire story.

I am requesting compensation of 500K once the legal challenges to this project subside. In the meantime, I ask for a written response from you stating Mortenson's intent within 2 weeks of the date of this letter. This amount represents the net profit from an interior design fee, a finders fee and the approximate amount of out of pocket expenses I have incurred in the past decade.

My records along with a half dozen individuals willing to substantiate the points I have outlined in this letter portray a very different perspective from that which has been presented to me in the October 2014 letter. Enclosed is a snapshot of project records along with a couple of testimonials from individuals with first hand knowledge of the history regarding this matter that substantiate the points in this letter.

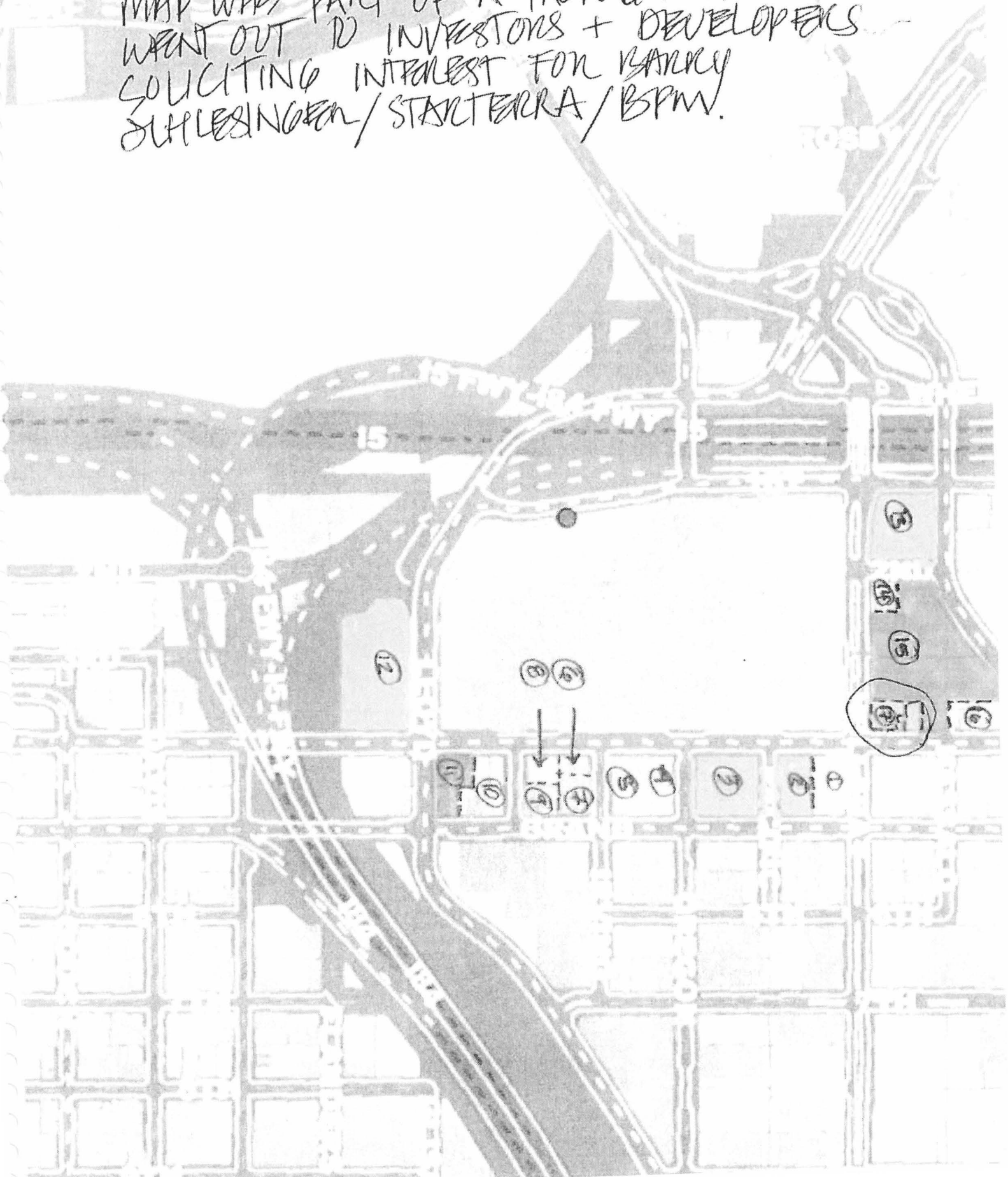
If I do not hear from you by the 3rd of December, I will be turning my files over to an attorney. I am sure you understand that once attorneys become involved, this issue will become a matter of public record. The City of Portland, Hyatt Hotels, the Schlesinger family, Mortenson and the Convention Center itself all have a great deal at stake. Public awareness of this project's actual history may not cancel the project but will most certainly cause many problems, a lot of bad press as well as the distinct possibility of additional delays.

It is my hope that your actions live up to your reputation and this matter can be settled fairly. I am happy to sign a non - disclosure agreement to put the issue to rest if you can see your way to honoring my request. I am also willing to meet with you in Kirkland to discuss the matter or to schedule a call.

Sincerely,

Lisa Marechal
Principal
Neo Design Studio

MAP DRAWN BY LISA MARTECHAL PRIOR TO
CURRENT RFP + PROJECT AWARDED. THIS
MAP WAS PART OF A PACKAGE THAT
WENT OUT TO INVESTORS + DEVELOPERS
SOLICITING INTEREST FOR BANKLY
SULLINGEN / STARTEIRA / BPMV.



EARLY 2004 - PRE-TRAINING

Assessment of Potential Developers

For the past several months, I have been keeping track of points made in phone conversations with PDC officials and reviewing all documents + submittals available regarding this project. My assessments + concerns regarding the two potential developers we are considering approaching are noted below. Please be prepared to discuss + assist following our team meeting on 3/8/03

Jones Lang LaSalle

- Concern over the lawsuit.
- No experience building larger hotels over 400 rooms.
- Not familiar with Portland.
- Doubts about financing. (Possibly unaware of REIT)

Comments

- Lawsuit must be addressed to our satisfaction.
- Private local investment might strengthen equity picture + address familiarity with Portland.
- Links to other NE redevelopment concerns would be a big help with the RFP.
- Crestline may not be perceived as highly as Hines. It will depend on the flag they decide to fly and how thoroughly they deal with the litigation issue.

Assistance Needed:

- Can Swinerton dig into the lawsuit issue through past project contacts to determine amongst ourselves if this will be a deal killer? Michael McElwee of the PDC mentioned this was a concern.
- Can Crandall Arambula come up with a short list of objectives in NE that would light up the PDC if some of these issues were folded into the response to the RFP?
- We need to ask the PDC if bundling the developers with operators has been decided upon one way or the other.

Hines

- PDC seemed very impressed with name + track record of Hines however, the Hines response was less specific to hotel development and too brief regarding a commitment to sustainable building.
- Concern over familiarity with Portland.
- No litigation issues to contend with.
- Experience with hotels larger than 400 rooms.
- Response to RFQ not as complete as others.
- Hines equity participation may be considerably less than Jones Lang LaSalle/Crestline.

Comments

- Private local equity would strengthen equity picture + address familiarity with Portland.
- Links to other NE redevelopment concerns would help with the RFP.

Assistance Needed:

- We need to try to get a handle on how much equity the Hines team is proposing for this project.
- Finding out what flag Hines is considering could also help. Neo knows they have past relationships with Ritz Carlton/Marriott, Westin and Hilton. The hotel operator will have a significant influence.

Our Team's Strengths for Both Development Entities

- 75% local team. Helps familiarity with Portland + local participation concerns of PDC.
- SOM has designed several large hotels over 400 rooms. We consider them almost local.
- Swinerton has experience with multiple hotel clients and has also built many large properties.
- Two DBE/WBE firms on prime consultant team. Bray Whaler is in the process of getting certified in Oregon. I have asked about DBE/WBE with a foodservice consultant we are in discussions with.
- High level of expertise in a tight team with no fluff. Need to discuss ZGF team as comparison.
- Many team members have familiarity and past working relationships with each other.
- Neo Design Studio + Bray Whaler are familiar to both Crestline + Hines. Swinerton has a past working relationship with Jones Lang LaSalle.
- Strong LEED certification + experience across the entire project team.

Team Meeting

- Background of our strategy and report on where we are at this time.
- Report on alternate site from Barry Schlesinger.
- Status on Customs House RFP's.
- Hines Pros + Cons
- Discussion of options for teaming with Jones Lang LaSalle as development lead.
- Ann to report on Vantage PRM
- Lisa to relay Dales contact info. Mesa Development.
- Team vote on how to proceed.
- We need to discuss contact folks with our development lead.
- Discussion about hotel operators. Rick to relay any thoughts. At past meeting we rated the operators of interest in the following order:
 - 1) Hyatt
 - 2) Intercontinental
 - 3) Omni

Subject: Portland Headquarters Hotel
Date: Monday, August 16, 2004 1:37 PM
From: Lisa Marechal <lisa@neodesignstudio.com>
To: Barry Schlesinger <bbear@bpmdev.com>

Barry:

Thanks for taking the time to speak with me today. I am attaching electronic copies of the paperwork I left with you today in case you want to forward them to anyone. I do want to keep an extremely low profile about what I am up to so please don't discuss this with anyone unless you trust them completely.

I called both Peter Belisle who is on vacation but back Wednesday as well as Bill Plautz with Hines in Seattle. They are both aware that you will be calling them. Bill knows you would be interested in the Parking component.

I also just got off the telephone with Harold Pollin who has been on the PDC advisory committee for this project. Harold has been keeping me in the loop on his involvement with advising the PDC. They just had their last meeting with the PDC this past week and he says he expects the RFP will be issued by the end of the month.

Harold also says that he thinks the project will probably go the public corporation route. Denver just did this. I will fax you a copy of the article later today.

Please call me after you have chatted with both of these guys. You may also want me to get some specific information from Michael McElwee at the PDC prior to speaking with your bank.

Lisa @ Neo

Peter Belisle
Jones Lang LaSalle
355 South Grand Avenue Suite 3100
Los Angeles, CA 90071
(213) 680 - 7933 direct office line
(310) 994 - 4622 cell

William (goes by Bill) Plautz
Hines
800 Fifth Avenue
Suite 3838
Seattle, WA 98104
(206) 262 - 4100 office

Subject: Update

Date: Monday, August 16, 2004 9:18 PM

From: Lisa Marechal <lisa@neodesignstudio.com>

To: Pdx HQ Hotel <lisa@neodesignstudio.com>

Hi Everyone:

We are nearing the end of team formation + strategy and coming close to the day of reckoning. Our team is all but formed with the exception of SOM's local partner. Any remaining consultants we will leave up to our chosen development lead as we have answered every PDC wish list item in spades with the team we presently have.

I have met with both Jones Lang LaSalle + Hines. Both are quite interested in our team and waiting to see RFP's. We now need to shore up the equity part of the equation or we will be a team without a project. Peter Belisle of Jones Lang LaSalle says no matter how they slice the deal they come up about 30 ml shy. I don't know where Hines weighs in here but will find out through a 3rd party very soon.

I had a meeting today with Barry Schlesinger of Ralph Schlesinger Company who will contribute a significant amount of equity to this project provided he gets the parking contract. He is the face behind Star Park here in town. Barry will be touching base with both development leads later this week and he + I will have another chat next week.

Barry is also having breakfast with the folks at Ashforth tomorrow but wasn't sure why until we were well into our meeting when a light went on! I relayed that I thought they would be discussing the topic we were presently discussing... I have Barry's word that where our team goes, he goes. He has also agreed to keep all of our discussions completely confidential. Our teams strategy is to be the stealth bomber that comes in at the 9th hour and obliterates the competition.

Barry + I discussed other players. Joe Weston is on the list. I would like to hear from anyone out there that has contacts for potential additional investors. Especially local ones...

If I beat Ashforth by a day to Barry Schlesingers door, our team needs to think on its feet and move quickly. My guess is we will still be looking for an additional 10 to 15 ml. The PDC loves our team but in the end it is always the money that matters to borrow from Randy Neuman.

I have also been in regular contact with Harold Pollin who has been on the advisory committee to the PDC for preliminary review + commentary on the RFP. For those of you who do not know him, he owns the Sheraton at the

airport and is a respected businessman here in town.

Harold called to fill me in on the advisory committees last meeting with the PDC, which was last week. The likely deal structure will be similar to what was just implemented in Denver. Harold says the RFP will likely go out at the end of August as it has one more stop at the PDC Chairman's office.

He asked me to let him know who is on our team and where we wind up. There is no gag order out yet but I think Harold may have some involvement with the selection committee. I thanked him for all his help + told him I would drop him a note once we make our final decision as a team.

The city of Denver formed a nonprofit public entity that is acting as owner of the future hotel. The financing is being secured through tax exempt revenue bonds. The bonds will not be city bonds therefore will not be secured by voters. They are paid off by future operations of the hotel.

My cell phone number is no longer mine and I will be getting a new one next week. If anyone has any ideas, please call me at the office as soon as possible. Our team needs to stay a few steps ahead of the Ashforth team. The office number is: (503) 241 - 7749.

Barry Schlesinger thinks the Ashforth team is the only real competition our team has for this project. He strongly feels that if we match their financial clout, our team will be an easy 1st choice for the selection committee over the Ashforth/ZGF/Turner/Garfield Traub camp.

Respectfully Yours,

Miss Dialing for Dollars!!!

Subject: PDX RFP

Date: Friday, October 1, 2004 6:33 PM

From: Lisa Marechal <lisa@neodesignstudio.com>

To: Bill Plautz <bplautz@hinesnw.com>

Hi Bill:

I got my weeks mixed up. I will be in town Monday through Wednesday the 6th.

I need to draw up a letter of understanding for Hines if you are going to pursue the project. I will be working on this over the weekend and need to see an attorney on Monday the 4th so I can issue it before leaving for Lake Coeur d'Alene.

Since we last spoke, our team has become pretty flushed out, Barry has committed 30ml to our teams lead and we may have a better site than the current PDC site mentioned in the proposal. Will know more on site by end of next week.

RFP's are due mid December. We will need to get a commitment from Hines or JLL no later than October 15th. I will spell everything out in the letter and fax you a copy with hard copy back up but I need to know if it should be addressed to you or Rob or someone else?

I got your address from Angie today so if different, please advise. Sorry to contact you so late with this. It has been pretty hectic nailing all of this down. If you don't get this email til Monday, please call me on my cell with the info. That is: (503) 577 - 3326.

Hope all is well with you. If this one doesn't work out, I hope you will keep us in mind for other projects. It has really been a pleasure meeting you and I hope you like the PNW enough to stick around. Quality developers and project managers are in short supply in this region.

Lisa @ Neo

Subject: Scott Miller

Date: Thursday, March 4, 2004 2:02 PM

From: Naish, Paul <Paul_Naish@hines.com>

To: <lisa@neodesignstudio.com>

Scott Miller is now the Vice Chairman at Hyatt, although he will only hold that title for about another month. Here are a couple of ways to reach him: Try his cell: 312-286-8877. E-mail him through his assistant, Dee Houdek: dhoudekforsmiller@yahoo.com. Fax him c/o Dee at 708-444-7005.

SEPT 10th, 2004

Locally owned compatible tenants for hotel pad site:

Although it likely would not be stated publicly, there is a very strong preference here in Oregon to support locally owned + operated businesses. The selection committee will be made up of individuals with this unspoken preference. This list has been prepared to provide our chosen development lead with inside information to assist them in developing a compelling response to the RFP. I personally contacted many of these businesses to ascertain if there would be interest. It may be highly beneficial to our team's chances to obtain preliminary commitments to fold into the RFP response.

Steakhouse Restaurants

Ringside Restaurant - operated by Craig Peterson of the Peterson family. The Ringside has been in business for several generations. This restaurant is very popular with the natives. Craig is very interested in this opportunity.

Portland Steak + Chophouse - operated by Portland based Pacific Coast Restaurants

Ruths Chris Steakhouse - operated by Steven Queyrouze from Bellevue. He runs several Ruths Chris Restaurants including one on Portland's westside.

Casual Restaurants

Capers Café + Catering Company - operated by a husband and wife team with an airport location that can be viewed. Great food.

Elephants Delicatessan - operated by a group of local investors. This is a higher end deli with excellent local name recognition.

Caprials Bistro + Wine - Caprial + John Pence are known in the local community, have a TV show and Caprial has published a few cook books.

Pizzacato Gourmet Pizza - This is a great locally owned Pizzeria with several existing locations. A universal local favorite.

Coffee Shops

Boyd Coffee Company - This is an old established coffee wholesaler that serves many restaurants and has a few local stores. They would definitely be interested in the headquarters hotel location.

K + F Select Fine Coffees - K + F sells in grocery stores and has a few local cafes.

Pete's Coffee + Tea - Although not local, they are popular and are Bay Area based.

World Cup Coffee + Tea - Locally owned with two to three existing outlets.

Miscellaneous Oregon Based Retailers

Columbia Sportswear

Twist

Nike

Moonstruck Chocolatier

Adidas

Harry + David

Your Northwest

Newstand/Bookstore Retailer

Powells City of Books -

Riches Cigar Store

Oregon Commission for the Blind - operates news stands + sundry shops in state owned as well as privately owned buildings. Contact Ray Milojevich @ the Business Enterprises division of this agency. Telephone: (503) 378 - 8479. DBE/WBE points for this arrangement.

PURE RFP (AUG/SEPT 2004)

Portland Mixed-Use Project Description

A pre-assembled group of consultants and a minority local equity partner who controls a site are currently involved with what is envisioned as a mixed-use development to include a headquarters hotel across the street from the Portland Convention Center. Our team began to assemble and strategize in response to an RFQ + RFP issued by the Portland Development Commission with the stated intent to develop a headquarters hotel. We assembled a team consisting of the most highly qualified disciplines to respond to the PDC agenda.

Initial strategy involved troubleshooting the shortcomings of this project as described by the PDC. This led us to a search for local equity and a larger site enabling the team to submit with a mixed-use parcel. A local developer joined our group who is able to contribute equity but does not want to take a leadership role. His company is interested in the parking management contract in addition to the land transactions. He has assisted our group in securing an option on the original site the PDC had identified for the headquarters hotel. We have an exclusive option on this preferred site.

The current site being offered by the PDC is also available to respond to but is 1/2 block shy of the land mass needed for the headquarters hotel. The remaining 1/2 block is ensnared in an eminent domain lawsuit and the other teams are all submitting on this official site. Our team would be the only team submitting on an alternate site which was the 1st choice of the PDC, is directly across from the entrance to the convention center, on the light rail and twice the size of the official site offered in the RFP. Our team's site is 2.5 acres under option with another contiguous 1 acre parcel owned by the PDC. This parcel coupled with abandonment of the streets within the site area would bring the land mass to approximately 4 acres.

Zoning is Central Commercial with Design Overlay, FAR is 12.1 and Height Limit is 250 feet. The Max Light Rail stops along the South edge of the site with lines that go directly to downtown as well as the airport. Southern and Western views are to the Willamette River and downtown. These two corridors are protected by the Convention Center. Eastern views are to the Lloyd District, which consists of office, retail, housing and government buildings and to the Cascade Foothills as well as Mount Hood. Northern views are to Mount Saint Helens and Mount Adams. Southern views are to the Convention Center.

Potential incentives include PDC incentives, subsidies and urban renewal district monies. Portland Development Commission land write downs for the PDC owned contiguous block 47, New Market Tax Credits, Transit Oriented Development Program Incentives and Property Tax Reductions for residential uses.

A larger mixed-use development encompassing the headquarters hotel would enable a development lead to spread the infrastructure costs over much more real estate product bringing down the costs directly attributable to the headquarters hotel alone. The site could easily accommodate a condo, apartment or office tower in addition to the hotel. A residential tower could offer fractionally owned units to supplement the hotel. There is also the opportunity for a significantly greater amount of restaurant and retail at the street level. This site is within two blocks of the Rose Quarter arena where the Trailblazers play and concert performances are offered. There is also a proposed professional sports training and competition training facility adjacent to the arena. One restaurant tenant and several retail tenants have already expressed interest in our location due to existing proximities.

Our group approached Jones Lang LaSalle as they were one of the original respondents to the RFQ. Crestline Hotels + Resorts was the equity player bundled with JLL as the development manager. Crestline pulled out. When this happened, Peter Belisle of Jones Lang LaSalle offered to our team to continue to participate with a new group. A new equity player would need to participate with Jones Lang LaSalle as co-development manager for the headquarters hotel only if there were an interest in responding to the public/private play. Currently the PDC is offering 2 blocks with a 4 million subsidy on the offered site. Our team would only need 1 block of alternate PDC owned block 47 so we think additional cash subsidy could be offered in lieu of the 2nd block. RFP's are due mid December. A go/no go decision must be arrived at quickly in order to complete the requested body of information within the RFP.

For a variety of reasons, Crestline bowing out is a silver lining as everyone on the team senses the mixed-use proposal on the alternate site is the winning response rather than a stand-alone hotel on the officially offered site. In order to be successful with this strategy, a development lead with mixed-use experience and an appetite for large-scale development is the best match for the project team. Experience with large headquarters hotels, public private partnerships and mixed-use developments are important to the teams credentials relevant to evaluation criteria established by the Portland Development Commission.

We are ready to get started on the concept development work needed in the RFP response. Our local equity partner has gathered a lot of critical information and has identified a few other parcels in this neighborhood that a developer might be interested in. Thanks for your prompt attention to this matter. We look forward to speaking with you shortly regarding this exciting opportunity. Team contact information is listed below.

Barry Schlesinger
BPM Development
Office: (503) 223 - 4128
Cell: (503) 730 - 0269
Email: bbear@bpmdev.com

Lisa Marechal
Neo Design Studio
Office: (503) 241 - 7749
Cell: (503) 577 - 3326
Email: lisa@neodesignstudio.com

Headquarters Hotel Mixed Use Project Points

- This team needs to be careful to respect the public/private process rules. David Brubaker has been involved with a number of these so I have asked him to be available for input and to attend the meeting. He senses that Ashforth Pacific may have an attorney hovering over what is transpiring to cry foul if they don't like the outcome of this process.

This would seem to be supported by Michael McElwee contacting me in LA and specifically asking me to have Jones Lang LaSalle submit a request in writing about the change in team structure. He informed me that he had specifically extended the deadline for questions so our team could follow procedure. It is important to note that the cut off date for questions is:

November 20th. Email is fine: mcelweem@pdc.us. He will forward to Chip Lazenby for an official answer.

Other members of our team which have experience with public/private processes are Rick Schmidt of Conventional Wisdom, Rodger Benson with Mortenson and possibly Yost Grube Hall.

- OMNI + Hyatt can be brought up to speed much more quickly if we can get Jones Lang LaSalle to share the proforma done jointly with Crestline during the RFQ process. Scott Johnson with OMNI informed me that this would enable them to make a more definitive commitment to our team. It should probably be reviewed by David + yourselves before being passed on.

- Remember that Rick Schmidt and David Brubaker are available to assist your efforts.

- The selection committee comments regarding the headquarters hotel experience of Jones Lang LaSalle indicate a concern with weak experience in this area. Steve Crowder who would be their PM on this project could compensate quite a bit for this if they highlight more of his past positions and project experience in the RFP response.

It would also help to fold Barry's mixed-use project + Capstone's Cascade Station into the RFP. Part of the selection committees concern was addressed by adding SOM to our team as they have done a number of these hotels and several extremely large hotels.

- There also seems to be a distinction that the selection committee + the PDC make between headquarters hotels and other types of hotels. The hotel operator with the most headquarter hotel experience would help this significantly so we should try harder with Hyatt.

- There was concern addressed by the selection committee over the Jones Lang LaSalle lawsuit which Brian Powell informs me is still active. I discussed briefly with Brian how we could mitigate this issue. Certainly the fact that JLL has no financial stake in the project could be played up further. The point is that it MUST be addressed somehow.

- I believe we will be the only team that will submit with a convention center consultant on board. This should be played up. MERC + POVA are very aware of Conventional Wisdom's expertise.

A little extra explanation in the RFP of their role could also compensate for the concern over headquarter hotel experience as they also have consulted on some of these hotels for other municipalities. Conventional Wisdom knows the players at MERC so discuss this with them.

- Either Barry or Jeff need to take the lead as the local contact so we don't flood Peter Belisle with too many incoming requests. Which one of you want to take the lead? I want to put this into my last update to go out tomorrow. It will involve clarifying each consultants role in the RFP response and keeping everyone pointed in the right direction to complete the work on time.

- Who is going to take the lead on negotiating with the hotel component?

- Who is going to be responsible for finding the equity?

Page 1 of 2

- George Efsthathiou of SOM informed me a few weeks ago that there will be costs for the concept level design submittal. David informs me that compensation for direct expenses is normal but charging fees is not. This should be addressed before the meeting so that it doesn't become an issue.

- There are some folks I did not get to follow up with. If I hear from them, I will forward the email to one of you. However, I would suggest that someone specifically follow up with the following:

EQUITY:

George Roberts of Kohlberg Kravis + Roberts in Menlo Park: (650) 233 - 6560

Sheila Sherman of Crescent Real Estate Equities: (817) 321 - 2100

Larry Covert with CNL Investment Company: (888) 205 - 0569

Oregon Pension Funds such as PERS, possibly SAIF Corporation, Etc

Chad Crandall with Capital Hotel Management: (978) 522 - 7006 (Referred by Rick Schmidt)

Stanley Gray with Grossman Company Properties: (602) 390 - 8027 Cell
(I have spoken with them regarding this project. They can not lead but may be interested in investing. Touch base with him. He is a great guy.)

Kathleen Waldorff MD @ Waldorff Center for Plastic Surgery : (503) 646 - 0101.
(Moved here in 1999. I believe this is the Waldorf family who used to own the property in Manhattan.)

DEVELOPERS:

Jeff Cohen with Gatehouse Capital: (214) 922 - 4300
(Note: Affinity for Starwood)
Katrina Griggs with Stormont Noble: (404) 260 - 9649
(Note: Headquarters Hotel Guys)

Rich Marr with Namwest: (310) 207 - 1000
(These guys like mixed - use and are amply funded but will likely want to run the show. Please keep in confidence but they are looking at acquiring Intercontinental Hotels. Rich is the money man. Must pass muster with him 1st. Partner is Jim Henrie: (602) 315 - 7910.)

Dick Shiels with Mesa Development:
Speak with George at SOM regarding these guys. They passed but he knows them well and may be able to get them to take another look. They did McCormick Place. (312) 266 - 1002.

HOTEL OPERATORS:

Scott Johnson VP of Development with OMNI: (972) 871 - 5543
Dale Moulton Sr VP of Development with Hyatt: (312) 750 - 8539 (This is the entire teams 1st choice. George of SOM will be following up with Dale this Friday)
Craig Mueller VP Development with Intercontinental Hotels: (630) 753 - 8850 (3rd option)

Headquarters Hotel Points

- Portland Development Commission is aware of our forming consultant team and suggested we contact Hines when asked about their preferred development leads. The PDC has stated they will be seeking bundled teams.

- Hines has scored points in the PDC process for this project by showing interest, asking questions and engaging the PDC. This is behavior they like to see. Lisa and several other team members have done the same on an ongoing basis for the past four months including a two hour meeting with Michael + Abe where Swinerton, Conventional Wisdom, SOM and Neo were all represented.

- A great deal of emphasis will be placed on project teams being local largely due to Oregon's economy of the past three years. The Governor contacted the PDC saying that this should be a job that goes to local consultants. PDC actions will be closely monitored by the Governor.

Our team is presently working on SOM either partnering with a local architect of record or reopening a Portland location. The remainder of our team is either local or will have a local presence. We have exclusive commitments from the most experienced and highly qualified local team components in most cases.

- Last week we were informed by a PDC spokesperson that the RFP will have a request for 20% DBE/WBE participation for professional services on the development teams. Our team will accomplish this with exclusive commitments prior to issuance of the RFP.

- I was informed that financial commitments, LEED experience and quality + experience of the developer + consultant team will be the most important selection criteria. The PDC really cares about experience and credentials. That being said, a lot of social engineering goes on in the Portland development community wherever the PDC and/or the city are involved.

- The last date I was quoted for issuance of the RFP was May 10th to 15th. We are addressing all known + implied issues and concerns of the PDC in our assembly process through research, constant contact with all public officials and discussions between us on how each of these issues should be addressed for best effect. Not only is the focus to be on the winning team, it is to be the winning team through thoughtful assembly of each component of the team.

- Collective intelligence of our team is excellent. Our assessment is that the selection process will yield four serious contenders. These will be the Ashforth Pacific/Garfield Traub/Sheraton/Turner/ZGF team, the Faulkner/Fletcher Farr Ayotte team with an unknown operator, Hines and Jones Lang LaSalle/Crestline team. Crestline will likely hang an Intercontinental flag.

- The Ashforth/ZGF team has an inside track on this project as Henry Ashforth owns so much real estate in NE and ZGF has inside knowledge from their participation with the convention center and the preliminary studies for the planned hotel. Our team has been crafted in a manner to offset all inside knowledge of the Ashforth/ZGF team for the purpose of assisting our development partner in crafting a response to the RFP that shows deeper knowledge and greater understanding of the issues.

- We have also prepared a list of potential local investors to offset the Ashforth presence on the ZGF team. Oregon is very insular and this commitment by a local real estate tycoon needs to be offset with the presence of other local tycoons in order to have it become a nonissue.

- Our independent research has yielded that Hyatt would be the best operational match. Several members of our project team have experience with Hyatt. We think the PDC really wants a 4 star hotel product for the convention center and Hyatt would really win them over both from a track record and image standpoint.

Neo design studio INC
INTERIOR ARCHITECTURE & DESIGN

To: Barry

Project: Headquarters Hotel

From: Lisa

Regarding: RFQ Respondant

Date: 10/15/04

Total Pages: 1 + Attachments

You are not going to believe it after you read this submittal but the PDC eliminated these guys after the RFQ process because they felt they didn't have enough hotel experience. When you read this, it is like they get what the city is all about. Our team has enough relevant experience to more than offset this concern. I know the PDC really liked their company and this is why I revisited their submittal. It is likely you will hear from them in the next few days and this is why I am advancing you a copy of this submittal. I am also sending one directly to Peter Belisle.

I sent them the attached email Friday. I think it is becoming EXTREMELY IMPORTANT that you get Alan Peters committed exclusively to our team in writing ASAP. I am sure you will see why fairly quickly.

When you get in, you will also see that I sent an email to two guys at RC Hadreen Company. Hadreen had inquired about this project but it was too late. His company just opened a Hyatt in Seattle that Mortenson built. I should know by Monday late day if Mortenson is on board but they bring a 300 ml financial statement that will trounce Turner Construction! David and Rodger should be at the meeting on Wednesday morning. Please bring a Star Park brochure.

Though it has been and will continue to be bumpy, this thing is beginning to come together beautifully and I am feeling hopeful that all of this work is about to pay off. See if you can get something out of Peters this week. The team really needs this trump card as an exclusive. Thanks Barry.



Lisa Marechal <lisamarechal@gmail.com>

Fwd: David Dibo

3 messages

Lisa Marechal <lisa@neodesignstudio.com>
To: Lisa Marechal <lisamarechal@gmail.com>

Wed, Nov 20, 2013 at 10:16 PM

Begin forwarded message:

From: Lisa Marechal <lisa@neodesignstudio.com>
Subject: David Dibo
Date: April 26, 2006 5:01:28 PM PDT
To: Barry Schlesinger <bbear@bpmdev.com>

Barry:

David may be interested in financing your project which is great for all concerned. I would like to bring the hotel piece to the deal when the time comes. When I stop in next week I will have a couple of other names of folks on my mail list that like to finance mixed use and may also be able to provide equity.

Lisa

Lisa Marechal <lisa@neodesignstudio.com>
To: Lisa Marechal <lisamarechal@gmail.com>

Wed, Nov 20, 2013 at 10:34 PM

Begin forwarded message:

From: Lisa Marechal <lisa@neodesignstudio.com>
Subject: Re: David Dibo
Date: January 12, 2006 12:34:03 PM PST
To: <Rodger.Benson@mortenson.com>

Hey Rodger:

One last thing... Anna knows all about the VMS debaucle. Call her and she can tell you what it stands for.

Lisa

To: JOSH SCHLESINGER
From: USA MARRETTAL
Date: 5/30/06

Project: CINEMA 4 THE CROSSING
Regarding:
Fax Number: (503) 223-1877
Total Pages: 2

JOSH:

HERE IS THE RESEARCH I DID ON SUNDANCE
CINEMAS. THE ATTORNEY FOR ALL OF
ROBERT REDFORDS COMPANIES IS A GUY
NAMED TOM JOURN (801) 705-8994.
HE IS UTAH BASED - I THINK.

THEY WERE VERY INTERESTED IN THE
EXPANSION OF PIONEER PLACE + WERE
GOING TO PUT THEIR 1ST CINEMA
THERE. I THINK THEY BOWED OUT
BECAUSE OF 911, HOWEVER THEY WERE
ALSO ON A 2ND FLOOR + MAY HAVE
DECIDED TO HOLD OUT FOR MORE
STREET PRESENCE.

Nisa

Press Releases.

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FIRST SUNDANCE CINEMA CENTER SLATED FOR MADISON, WISCONSIN

New Concept for Diversified Independent Film Programming to Open in Fall 2006

Sundance Cinemas, LLC and Joseph Freed Associates today announced plans to have the inaugural Sundance Cinema Center in Madison, WI. The state-of-the-art, multi-screen theatre dedicated to independent film will be built at the Hilldale Mall as part of the second phase of a major mixed-use renovation of the entire commercial complex and is expected to open in the Fall of 2006. Joseph Freed and Associates purchased Hilldale Mall in 2004 and will complete the initial phase of the renovation by the end of this month.

"The independent culture of Madison makes it a great environment for the Sundance Cinema concept and we look forward to creating together with the local community, an experience that captures that unique nature," said Sundance Group President Robert Redford. "I couldn't be more pleased that this location will launch this venture."

Bert Manzari, Sundance Cinema President of Film and Marketing added, "In addition to the best in independent and foreign language films, we will be connecting Madison to the excitement of the Sundance Film Festival and other major film festivals around the world, through unique programming and events."

Long known as Madison's most desirable shopping address, the venerable Hilldale Mall will construct the new six screen facility as the south anchor tenant. The existing Hilldale Theatre building is planned to be converted to non-theatre use in Fall 2006. "The new Sundance Cinema Center in Madison will not only carry on a tradition of presenting independent and culturally diverse entertainment at this location, but will offer even more art screens for a community that is interested in sophisticated film," said Hilldale Theatre owner Bill Adamany. "We wish Sundance and Joseph Freed well as they continue their renovation program at the Hilldale Mall."

Andy Stein, Development Manager for Joseph Freed and Associates echoed this sentiment adding, "Keeping a movie theatre at the Hilldale Mall is important to both our tenants and to the Madison community. To have secured the first Sundance Cinema in the country not only satisfies that goal, but it presents a myriad of opportunities uniquely associated with the Sundance brand."

The new Sundance Cinema Center in Madison will feature the latest in presentation, technology, proprietary programming, drinking and dining amenities, and branded retail sales. The Center will be designed and operated in keeping with the Sundance traditions of independence, community-focus, environmental consciousness and commitment to quality in content and design. An area architect will be chosen from proposals currently being evaluated.

Paul Richardson, Sundance Cinema President and CEO concluded, "We envision the new Sundance Cinema Center as not only a great place to watch a movie in Madison, but combined with amenities such as a coffee bar and bistro, a place where people will also gather around the cultural experience."

TOM
Journey
(901) 705-8996
Shelley

Sundance Group

Established in 1988, the Sundance Group is a business entity wholly owned by Robert Redford. The Sundance Group oversees Redford's ownership interests in Sundance village, Sundance Catalog, Sundance Channel, Sundance Cinemas, LLC, as well as his involvement in the not-for-profit Sundance Institute, Sundance Film Festival and the North Fork Preservation Alliance. In addition, the Sundance Group is responsible for evaluating and launching new business opportunities for Redford and the Sundance brand.

Sundance Cinemas, LLC

Based in Los Angeles, CA Sundance Cinemas LLC previously announced plans to build a multiple facility national theatre circuit. Sundance Cinemas, LLC brings together Robert Redford's Sundance brand, a recognized name independent film, with the seasoned specialized theatre management team of Paul Richardson and Bert Manzari. Investment funds managed by Oaktree Capital Management are financing the company.

Joseph Freed and Associates LLC Joseph Freed and Associates LLC is a Chicago based vertically integrated, full service real estate business, engaged in retail, residential, office, hospitality, mixed-use development, redevelopment and urban in fill. Spanning its second generation, Joseph Freed and Associates LLC is proud of its heritage remaining family owned since its inception in 1965. Joseph Freed and Associates LLC combines long term ownership and commitment to maintaining the highest caliber of integrity in its relationships and quality of its product. Our real estate history consists of a total of 11 million square feet of commercial properties and 5,500 residential units, completed or under development.

Paul Richardson
Bert Manzari



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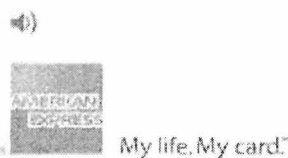
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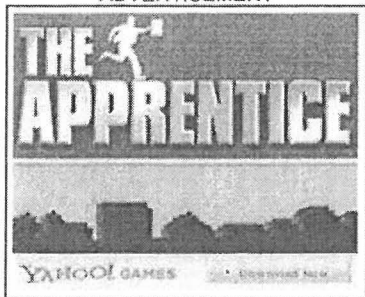
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Sundance to Launch Indie-Friendly Theaters

Saturday May 21 2:05 PM ET

Robert Redford's Sundance Group will launch Sundance Cinemas, a movie theater chain for independent, documentary and foreign-language films as well as some studio projects.

"Anything which helps new and interesting voices in the cultural realm reach more people can only enrich the experience of artists, audiences and communities," Redford said.

Other programming will include shorts, filmmaker interviews and public forums.

Sundance Cinemas will be operated by the theater management team of [Paul Richardson](#) and [Vert Manzari](#). The pair has worked together since starting an exhibition theater in 1975. That enterprise was merged with Landmark Theatres in 1982, growing into the largest art theater circuit in the country. Richardson and Manzari left Landmark in 2004.

The number of new theaters was not released. But Manzari said Sundance Cinemas is looking nationally for locations.

"Drawing on our collective long-term relationships in the independent film and festival communities as well as those in the realm of distribution, we feel Sundance Cinemas will be highly successful in crafting a new and different experience for audiences," Manzari said.

Redford founded Sundance Group in 1988 to oversee his ownership interests in Sundance Village, Sundance Catalog and Sundance Channel, as well as his involvement in the not-for-profit Sundance Institute, Sundance Film Festival and North Fork Preservation Alliance.



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Robert Redford, Sundance Group head, pictured at the Sundance Film Festival earlier this year. Photo by Brian Brooks/indieWIRE

New Sundance Cinemas Circuit to Launch In Madison, WI

The first theater in the new Sundance Cinemas arthouse chain is set to open one year from now in Madison, WI. The Sundance Cinemas circuit will be a national chain for mainly independent and foreign films, run by the former Landmark Theaters leadership **Paul Richardson** and **Bert Manzari** who left the chain about a year ago after working together for nearly 30 years. Oaktree Capital Management is funding the new company.

The six-screen Sundance Cinemas development is set for the Hilldale Mall in Madison that is being renovated by Joseph Freed and Associates; an architect has not yet been selected.

Manzari, the Sundance Cinemas president of film and marketing explained in a statement, "In addition to the best in independent and foreign language films, we will be connecting Madison to the excitement of the Sundance Film Festival and other major film festivals around the world, through unique programming and events."

Redford, through his for-profit Sundance Group, first announced plans for a Sundance Cinemas chain back in 1997 through a partnership with General Cinemas. That initiative finally came to an end four years ago amidst numerous financial challenges facing the exhibition business and the subsequent bankruptcy at General Cinemas.

"The independent culture of Madison makes it a great environment for the Sundance Cinema concept and we look forward to creating together with the local community, an experience that captures that unique nature," said **Sundance Group President Robert Redford**, in a statement Friday. "I couldn't be more pleased that this location will launch this venture."

(posted on Nov 4, 2005 at 08:00PM | filed under [Companies](#), [Lead Story](#))

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Paul Richardson, Bert Manzari", 'Sundance Cinemas, Robert Redford

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Sundance Expands (posted Apr 05, 2006 to Filmfodder)

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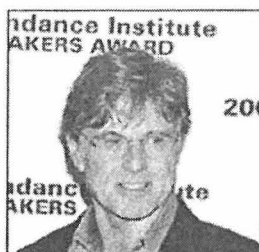
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Sundance launches Sundance Cinemas

Posted May 22nd 2006 11:57AM by [Peter Sciretta](#)

Filed under: [Opais](#) [Sundance](#)



[Robert Redford](#)'s Sundance Group has announced plans to launch Sundance Cinemas. The movie theater chain will showcase independent, documentary and foreign-language films as well as some studio projects. Other programming will include shorts, filmmaker interviews and public forums. "Anything which helps new and interesting voices in the cultural realm reach more people can only enrich the experience of artists, audiences and communities," Redford said. The number of new theaters was not released, but what is for sure is they're going national. Sundance Cinemas will be operated by the theater management team responsible for starting Landmark Theatres in 1982. Landmark is now the largest art theater circuit in the country. Some people may argue that this is just another step in Sundance's journey to wander from their indie roots, but I think it's a step in the right direction if they can keep their vision focused.

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Reader Comments

(Page 1)

1. Sundance Group & Landmark building/acquiring a bricks and mortar chain..huh? I've been sat here patiently waiting for the day when I could order an Independent movie online - their server uploads it to a

bird (75meg p/s) the bird contacts my IP and drops it on my PC...doesn't that technology already exist right now? Have these guys read that stats on the explosion of broadband subscribers? What is this all about? - is it just the piracy thing still?
 My message to Mr R...go out an create an Indie- movie pipeline that is available to the world population anytime and anywhere - where any Indie producer can present their product. You gotta be a Long Tail marketer, IMHO.

Posted at [11:14AM](#) on May 23rd 2005 by RayW [1 STAR](#)

2. I recall reading about Redford's plan to do this in Down and Dirty Pictures. From what I can recall this was originally planned for quite a while ago. Glad to hear that this is finally coming together.

Posted at [9:57AM](#) on May 24th 2005 by Belgand [0 STARS](#)



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Lisa Marechal <lisamarechal@gmail.com>

Fwd: You Were Right!!!

1 message

Lisa Marechal <lisa@neodesignstudio.com>
To: Lisa Marechal <lisamarechal@gmail.com>

Wed, Nov 20, 2013 at 10:41 PM

Begin forwarded message:

From: Lisa Marechal <lisa@neodesignstudio.com>
Subject: You Were Right!!!
Date: July 18, 2006 8:01:05 PM PDT
To: Rodger Benson <rodger.benson@mortenson.com>

Call me. I had dinner with my friend at the PDC.

From: Lisa Marechal <lisa@neodesignstudio.com>
Subject: FYI
Date: September 30, 2006 7:07:10 PM PDT
To: Barry Schlesinger <bbear@bpmdev.com>



Barry:

The reason I want to paper something is that it is becoming increasingly clear that you are not running the show anymore. This is just a smart business practice. Please try to understand my position.

David Dibo will be here the first week of November. If you are willing to allow me to discuss your new site plan with him, I would like to prior to his arrival.

I am sure you will hear from him soon and he will want to come by to see you and probably meet your partner Wayne.

Lisa

From: Lisa Marechal <lisa@neodesignstudio.com>
Subject: Call Me
Date: November 26, 2006 2:34:29 PM PST
To: Barry Schlesinger <bbear@bpmdev.com>




Hi Barry:

I have some confidential news and a novel suggestion for you about the Crossing. Call me when you get a chance this week.

David explained to me what you are up against when he was out here last. So I understand why my requests about money and paper have caused you so much consternation. I can wait and will settle on your word so don't sweat this.

I am pretty swamped these days and this is why I have been out of touch...

Lisa

From: Lisa Marechal <lisa@neodesignstudio.com> 
Subject: Another article about Omni...
Date: September 14, 2010 11:01:28 AM PDT
To: Barry Schlesinger <bbear@bpmdev.com>



1 Attachment, 201 KB

You know you are going to wind up being the headquarters hotel developer by default don't you? You are the only one left standing after that ridiculous PDC/MERC slog fest that dragged on for so long.

When Peter showed up for the interview for that METRO cafe, one of the gentleman at the interview made a humorous request asking if anyone could bring them a HQ hotel? At this point, their long list of demands will be at the discretion of anyone that can make it work.

By my best guess, we are 1.5 to 2 years from the onset of new construction but now would be a good time to begin a dialogue. The thing about Omni is that they have the funds to move forward with a deal that interests them.

Lisa



[Omni.pdf \(201 KB\)](#)



Lisa Marechal <lisamarechal@gmail.com>

Fwd: Thought you would find this article interesting...


2 messages

Lisa Marechal <lisa@neodesignstudio.com>
To: Lisa Marechal <lisamarechal@gmail.com>

Wed, Nov 20, 2013 at 10:22 PM

Begin forwarded message:


From: Lisa Marechal <lisa@neodesignstudio.com>
Subject: Thought you would find this article interesting...
Date: January 6, 2012 11:43:49 AM PST
To: Barry Schlesinger <bbear@bpmdev.com>
Cc: Rodger Benson <rodger.benson@mortenson.com>

 **Sharing a Single Building but Flying Two Flags Barry Swenson Builder to Develop a 175-room Residence Inn and a 146-room SpringHill Suites by Marriott Near San Jose Airport in California : January 2012.pdf**
89K

Lisa Marechal <lisa@neodesignstudio.com>
To: Lisa Marechal <lisamarechal@gmail.com>

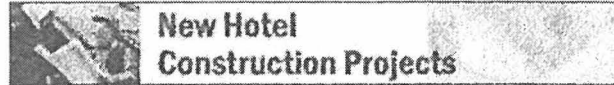
Wed, Nov 20, 2013 at 10:35 PM

[Quoted text hidden]

 **Sharing a Single Building but Flying Two Flags Barry Swenson Builder to Develop a 175-room Residence Inn and a 146-room SpringHill Suites by Marriott Near San Jose Airport in California : January 2012.pdf**
89K

Hotel Online

News for the Hospitality Executive



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Sharing a Single Building but Flying Two Flags, Barry Swenson Builder to Develop a 175-room Residence Inn and a 146-room SpringHill Suites by Marriott Near San Jose Airport in California

By George Avalos, Contra Costa Times, Walnut Creek,
Calif. McClatchy-Tribune Regional News

Jan. 04, 2012--Two new Marriott-branded hotels that will operate within a single building are slated to sprout near San Jose airport, executives with Barry Swenson Builder said Tuesday.

The project will add a total of 321 rooms to the South Bay hotel market sometime during the first half of 2014.

"It will be one hotel, but two different flags," said Scott Connelly, development project manager for San Jose-based Barry Swenson.

The eight-story building will be constructed on a vacant lot at the southwest corner of North First Street and Skyport Drive. One of the Marriott hotels will be a 175-room Residence Inn and the other a 146-room SpringHill Suites. Guests will come in through a common entrance but then find two distinctly different lobbies.

"The hotels will share the same 'back of the house' -- the same laundry, maintenance, breakfast operations," said Mike Black, senior development manager for Barry Swenson. The hotel complex also will have a garage and ground-level pool.

"To get hotel financing these days, you have to be creative," Black said. "You have to be extremely creative unless you are doing an all-cash deal."

"It's great that this site is now committed to a hotel," said Nanci Klein, deputy director for San Jose's Economic Development

Office. "We're getting inquiries about a few more hotel sites in the airport area."

Contact George Avalos at 925-977-8477. Follow him at [Twitter.com/george_avalos](https://twitter.com/george_avalos).

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From: Rodger.Benson@mortenson.com
Subject: Re: Follow Up
Date: February 2, 2012 3:06:44 PM PST
To: lisa@neodesignstudio.com

2 Attachments: 3 KB

Thank you Lisa! I'm glad you made it home safely last night. I guess that docal still had enough energy in it to keep you awake. I enjoyed our time together, as usual. I really hope things work out for all of us on the Convention Center Hotel development. It will also be nice to have you back in the neighborhood again. I'm sure we'll find other opportunities to work together as well.

Best,
R.



Rodger W. Benson, LEED® AP
Director of Project Development
Mortenson Construction: Building what's next.
phone 425.497.6603
cell 206.383.2656
14719 NE 29th Place
Bellevue, WA 98007
www.mortenson.com

Please consider your responsibility to the environment before printing this e-mail

From: Lisa Marechal <lisa@neodesignstudio.com>
To: Rodger Benson <rodger.benson@mortenson.com>
Date: 02/02/2012 10:31 AM
Subject: Follow Up

Hi Rodger:

Thanks for taking the time to speak with me about Barry's site last night. Pulled in the door at 12 midnight as I made excellent time due to no traffic.

Here are some of the contacts we discussed:

John Kratzer
CEO
JMI Realty
111 Congress
Austin, TX 78701
(512) 539 - 3600

Web: <http://www.jmirealty.com/>

Mike Usen
King County
work phone 206-684-1168
cell phone 206-288-3174

home email mike.usen@gmail.com

home address 3514 Wallingford Avenue North
Seattle WA 98103
USA

I sent Mike an email letting him know you may be inquiring about opportunities with King County. He is a very friendly individual who I have a great deal of respect for. Is also a very talented planner. Attached are a few samples of his private sector mixed use work before the meltdown. I got to know him while he was with SE Group in Bellevue. He has been with King County since the Fall of 2009.

Anna Goodrich personal email: anna.d.goodrich@gmail.com

I believe she will be returning from the Middle East in June and is currently looking for a job. If you hear of anything, I would appreciate it if you could let her know. I believe she is willing to consider out of state work if the position is a good match. I know she would be thrilled to hear from you opportunity or no opportunity.

If you have a little extra time on your next trip to Portland, let me know. There are a few questions I have about the anticipated schedule and timing of the work on Barry's site that I would appreciate knowing about so we are prepared for the work.

I am not sure who Tom may be speaking with and perhaps there are plenty of suitors but if interested, I could take a look at other prospects that may be in my database.

Let me know if I am forgetting anything. Take care.

Lisa @ Neo

[attachment "Rosario.pdf" deleted by Rodger Benson/Mortenson] [attachment "Broughton Landing.pdf" deleted by Rodger Benson/Mortenson]

2011 - 2014

From: Rodger.Benson@mortenson.com
Subject: Re: Questions
Date: February 15, 2012 4:11:53 PM PST
To: lisa@neodesignstudio.com

2 Attachments, 3 KB

Lisa -

Please don't spend too much time working on this yet. I talked to Mortenson Development about you and our history and they said you'd get due consideration at the appropriate time. At this moment they aren't willing to make any promises, as they're spending their time on politics and the financial stack. ESG, the lead designer for the projects, will ultimately need to be part of the decision as to how interior design will be managed. At this point they haven't even been to Portland yet. The program for the hotels hasn't settled down yet. Both are likely Hyatt brand with the full service being 414 keys and the limited service 183 keys. They're still tinkering with the podium so the conference spaces, meeting rooms, kitchen, retail, dining, etc. are still in limbo.

I hope this helps you start thinking about it.

R.



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Bellevue, WA 98007
www.mortenson.com

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From: Lisa Marechal <lisa@neodesignstudio.com>
To: Rodger Benson <rodger.benson@mortenson.com>
Date: 02/13/2012 03:35 PM
Subject: Questions

Hi Rodger:

Can you advise of basic program in this two hotel scenario? This will help us to make thoughtful decisions about the kind of staff we would want to have for this effort.

Based upon our teams last go around with PDC, we had approximately:

30,000 of additional meeting space
3 restaurants
couple of retail stores - ie gift shop + newstand
600 rooms with 4 to 5 room types including suites

I was focused on catching up when we met in Bellevue recently. Did not explain that we have three other small firms we do staff sharing with here in town. So want to start with that then see what is still needed.

The other important item here is some sort of anticipated schedule. If both of these hotels are envisioned to come out of the ground at the same time, that is a very different scenario than them being built sequentially. I know this is all preliminary right now but if you can provide the most likely scenario, we can start with that.

If this is to be loosely based upon Barry's efforts with Hyatt over the past few years, we can run with that for now. Thanks.

Lisa @ Neo

From: Rodger.Benson@mortenson.com
Subject: Re: Questions
Date: February 15, 2012 4:17:38 PM PST
To: lisa@neodesignstudio.com

2 Attachments, 3 KB

Lisa - Forgot to comment on the schedule. The limited service probably won't start construction until next Fall with the full service starting about a year later (due to the EBS financing lead-time). The developer selection process seems to be slipping at Metro so I don't know if that schedule will hold. R.



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If this is to be loosely based upon Barry's efforts with Hyatt over the past few years, we can run with that for now. Thanks.

Lisa @ Neo

From: Rodger Benson@mortenson.com
Subject: Convention Center Hotel
Date: May 31, 2012 3:14:27 PM PDT
To: lisa@neodesignstudio.com

2 Attachments, 3 KB


Confidential

Lisa - We had a development team meeting this morning in Portland and the topic of interior design came up. I will share with you that we signed an exclusivity agreement with Hyatt (finally) this week. Hyatt Regency and Hyatt Place will be our proposed brands. Hyatt is preferring that the interiors for the hotels be designed by a firm with Hyatt Hotel design experience. Ankrom made a pitch but admitted they didn't have it. What is your experience with Hyatt? If you have any please send me project profile information about it so I can pass it along. Please keep our Hyatt affiliation confidential, although I know there are already rumors on the street that it exists.

Thanks, R.



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Suite 300
Kirkland, WA 98033
www.mortenson.com

 Please consider your responsibility to the environment before printing this e-mail.

From: Rodger Benson <rodger.benson@mortenson.com>
Subject: Re: Hyatt Issue
Date: June 4, 2012 8:41:51 AM PDT
To: lisa@neodesignstudio.com

2 Attachments, 3 KB

Lisa -

I think Tom wants to make this decision this week, given the progress he needs to make on his proposal. He's traveling early this summer, requiring an early completion of the submittal for internal reasons. You'd better send me a profile on your firm so I can get it in front of him. I don't know if we can overcome the lack of Hyatt experience, but he needs to at least see your work. Limited service hotel work would be relevant in addition to your full service hotel resume. I'm sure he'd want you to have relevant experience working with any kind of team you'd put together anyway. He made that clear to Ankrom Moisan when they approached him.

R.



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Please consider your responsibility to the environment before printing this e-mail.

From: Lisa Marechal <lisa@neodesignstudio.com>
To: Rodger Benson <rodger.benson@mortenson.com>
Date: 06/02/2012 07:51 PM
Subject: Hyatt Issue

Hi Rodger:

If you can give me another week and a half, perhaps we can get together to discuss an interiors team with Hyatt expertise? Peter and I need to conclude discussions underway, then I can discuss them with you. We are going to continue with both tracks and go over them with you. I think one will work but you have to stall this issue for a bit until we can meet. I will be in Seattle around the 10th of June so perhaps then?

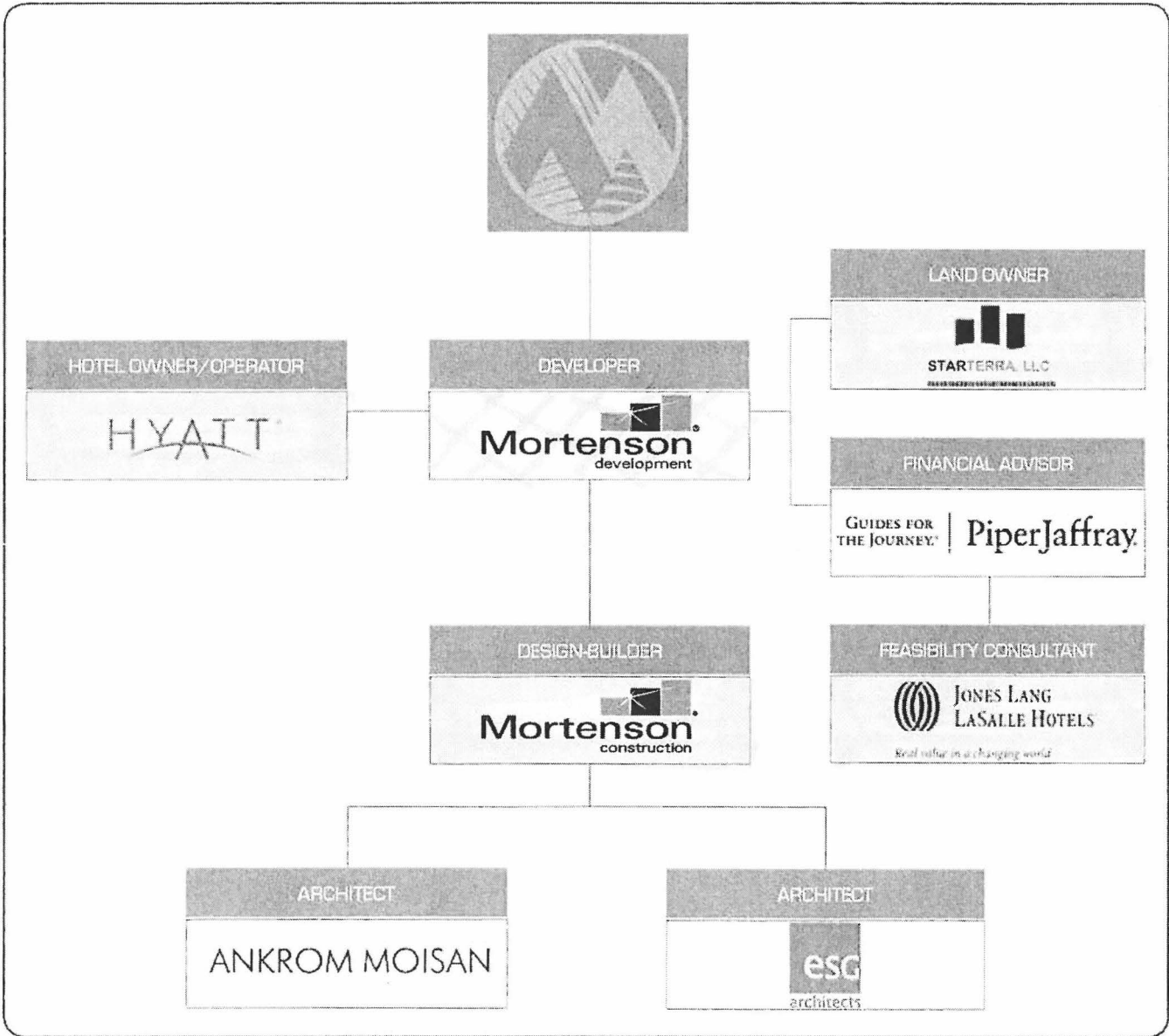
A few items which I should mention that will help the effort are the lighting designer we work with has completed two Hyatt's with one being a Hyatt Regency in San Francisco. Having spoken with both Anna (now with Hyatt) and my friend Tanya (worked at corporate for 10 years), both are delighted to be a reference for us.

Lisa @ Neo

Development Team Qualifications

PROVEN PROJECT TEAM

Mortenson's success is directly related to the team members that have dedicated their careers to understanding the intricacies of the development, design, financing, construction and operation. We are excited to deliver a turnkey solution including development and design-build, all under one parent company. With the Mortenson development team, you have a partner that brings the value and service required to maximize your capital investment, while creating the best development experience possible.



2011 - 2014

From: Rodger Benson <rodger.benson@mortenson.com>
Subject: Re: Questions
Date: February 15, 2012 4:11:53 PM PST
To: lisa@neodesignstudio.com

2 Attachments, 3 KB

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If this is to be loosely based upon Barry's efforts with Hyatt over the past few years, we can run with that for now. Thanks.

Lisa @ Neo

From: Peter Houseknecht <peter@neodesignstudio.com>
Subject: Fwd: Portland Headquarters Hotel
Date: July 22, 2012 10:31:11 PM PDT
To: Lisa Marechal <lisa@neodesignstudio.com>



2 Attachments: 3 KB

fyi

Begin forwarded message:

From: [Rodger Benson@mortenson.com](mailto:Rodger.Benson@mortenson.com)
Date: July 22, 2012 6:34:11 PM PDT
To: peter@neodesignstudio.com
Subject: Re: Portland Headquarters Hotel

Peter -

I discussed your firm with Nate Gundrum, with our development company, on Thursday. He confirmed that they won't be adding any additional firms to their team until the selection process is over. They're heavily focused on that right now. With an interview on Wednesday, that process should be over soon. Nate did confirm that Neo Design will be considered for involvement in the project but wanted another week before we discuss it further. He clearly understood where my support lays.

R.



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www.mortenson.com

Please consider your responsibility to the environment before printing this e-mail.

peter--07/13/2012 01:26:35 PM-- Hi Rodger I enjoyed seeing you again last week and I was glad to see you

peter@neodesignstudio.com
From:
rodger.benson@mortenson.com
To:
07/13/2012 01:26 PM
Date:
Portland Headquarters Hotel
Subject:

Hi Rodger

I enjoyed seeing you again last week and I was glad to see you are doing well following your surgery. I have tried to reach you a couple of times by phone to no avail so thought an email would be best at this point.

Pursuant to our meeting, we would appreciate your input regarding the next step for consideration of interior design services for the headquarters hotel project. In particular, please advise how or when to approach Mortenson Development. It seems awkward to make a cold call to Tom Landers. Would you introduce us?

I would appreciate your thoughts to clarify the matter for our team. We all are available in late July and could meet in Seattle.

On another matter could you who you have been in contact with at Sera Architects? We recently discovered our contacts there have left the firm, and I am speculating you would be dealing with the person leading hospitality projects there? We would like to re-establish relations with them and Lisa suggested I inquire with you.

Great to see you again and I look forward to hearing from you.

Best Regards,
Peter Houseknecht
Neo Design Studio
604.551.3294 cell

From: Rodger.Benson@mortenson.com
Subject: Re: Hyatt Issue
Date: June 4, 2012 11:37:55 AM PDT
To: lisa@neodesignstudio.com

2 Attachments, 3 KB

Lisa - Send them to me and I'll pass them along. It will give me a chance to further press the issue. I'm not sure when Tom is next in Portland. I'll try to find out. R.



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Please consider your responsibility to the environment before printing this e-mail.

From: Lisa Marechal <lisa@neodesignstudio.com>
To: Rodger.Benson@mortenson.com
Date: 06/04/2012 09:35 AM
Subject: Re: Hyatt Issue

Hi Rodger:

I would hope that there would be an interest in discussing the project and interiors team with us in person before making any decisions.

Would you like me to forward materials to him directly or should I send them to you?

If Tom is going to be here in Portland soon, we would greatly appreciate this courtesy. Peter and I are available on the 8th and 11th.

Lisa @ Neo

On Jun 4, 2012, at 8:41 AM, Rodger.Benson@mortenson.com wrote:

Lisa -

I think Tom wants to make this decision this week, given the progress he needs to make on his proposal. He's traveling early this summer, requiring an early completion of the submittal for internal reasons. You'd better send me a profile on your firm so I can get it in front of him. I don't know if we can overcome the lack of Hyatt experience, but he needs to at least see your work. Limited service hotel work would be relevant in addition to your full service hotel resume. I'm sure he'd want you to have relevant experience working with any kind of team you'd put together anyway. He made that clear to Ankrom Moisan when they approached him.

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<Mail Attachment.gif> Rodger Benson, LEED AP
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Date: 06/02/2012 07:51 PM
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Please consider your responsibility to the environment before printing this e-mail.

Peter - 07/13/2012 01:26:35 PM - Hi Rodger I enjoyed seeing you again last week and I was glad to see you

From: peter@neodesignstudio.com
To: rodger.benson@mortenson.com
Date: 07/13/2012 01:26 PM
Subject: Portland Headquarters Hotel

Hi Rodger

I enjoyed seeing you again last week and I was glad to see you are doing well following your surgery. I have tried to reach you a couple of times by phone to no avail so thought an email would be best at this point.

Pursuant to our meeting, we would appreciate your input regarding the next step for consideration of interior design services for the headquarters hotel project. In particular, please advise how or when to approach Mortenson Development. It seems awkward to make a cold call to Tam Landers. Would you introduce us?

I would appreciate your thoughts to clarify the matter for our team. We all are available in late July and could meet in Seattle.

On another matter could you who who you have been in contact with at Sera Architects? We recently discovered our contacts there have left the firm, and I am speculating you would be dealing with the person leading hospitality projects there? We would like to re-establish relations with them and Lisa suggested I inquire with you.

Great to see you again and I look forward to hearing from you.

Best Regards,
Peter Houseknecht
Neo Design Studio
604.551.3294 cell

From: Jeff.Madden@mortenson.com
Subject: Re: Hunt Family/Woodbine
Date: December 3, 2012 9:13:54 AM PST
To: lisa@neodesignstudio.com
Cc: Rodger Benson <rodger.benson@mortenson.com>

2 Attachments 3 KB

Lisa,

Thanks kindly for the email below. By the way, sorry we didn't hook up at the real estate event a couple weeks back. I was late arriving and then left early to pick up my sick kid from daycare.

Hope that all is well with you...

Jeff



Jeff Madden
General Manager
Mortenson Construction: Building what's next
phone 503.423.7266
cell 503.423.7266
610 SW Alder
Suite 200
Portland, OR 97205
www.mortenson.com

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From: Lisa Marechal <lisa@neodesignstudio.com>
To: Jeff Madden <Jeff.Madden@mortenson.com>
Cc: Rodger Benson <rodger.benson@mortenson.com>
Date: 11/30/2012 09:50 AM
Subject: Hunt Family/Woodbine

Hi Jeff:

I was in Seattle last week and picked up the Seattle Times. The attached article was in the edition I read.

Notice that the Hunt Family is mentioned within the article. This is the money behind the Governor Hotel acquisition we have previously discussed. Provenance Hotels is a partner on that project with them but I am not sure if that is casual dating or an engagement. There is a very different leadership attitude at the helm of each of these companies.

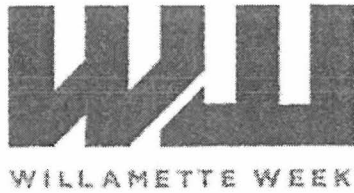
It appears from this article that there are other divisions of the Hunt family group of companies looking into different types of development. It also appears that there may be heightened interest in the Pacific Northwest region. Maybe they would be interested in partnering with Mortenson on a non hospitality venture to get their feet wet in a greater variety of development types? If Barry does not have equity lined up for other portions of his site, perhaps they would make a good dance partner to flush out the site?

I do know that many of Woodbine Developments projects have been mixed use with a hospitality anchor and most of these are Hyatt's. While in Texas in 2006, I met with Les Melcher of Woodbine who is a very gracious man. You are welcome to use my name to introduce yourself. He is in charge of new business development so is a peer of Rodger's. He has been with Woodbine for at least twenty years. I know that they have office holdings in Texas as I believe that they are anchored in one of their own buildings.

Hope this information is helpful at some point. I am copying Rodger on this as well.

Lisa @ Neo

[attachment "HuntFamily.pdf" deleted by Jeff Madden/Mortenson]
[attachment "Woodbine Development.vcf" deleted by Jeff Madden/Mortenson]



[Click to Print](#)

December 20th, 2012 | by NIGEL JAQUISS News | Posted In: Business, Cops and Courts

Judge Finds Schlesinger Brothers Engaged in Self-Dealing



A bitter lawsuit that pitted **Jessica Schlesinger** against her father and two uncles in **one of Portland's leading real-estate families** moved closer to final resolution last week.

At issue is the handling of the estate of the family matriarch, Bernice Schlesinger, who died in 2000, leaving an estate of just under \$13 million. Jessica Schlesinger, a beneficiary of her grandmother's estate, alleged that her father, **Paul Schlesinger**, and her uncles, **Mark and Barry Schlesinger**, transferred money out of the estate at the expense of other heirs.

After more than three years in court, there's finally a judgment: In an 87-page ruling, Multnomah County Court Judge Diana Stuart found extensive fault with the defendants and awarded Jessica Schlesinger, **nearly \$1 million in damages.**

The Schlesingers are currently seeking to develop a 600-room hotel adjacent to the Oregon Convention Center. Their holdings include Star Park garages and the Oregon National Building.

In her Dec. 10 ruling, Judge Stuart described numerous transactions that Mark Schlesinger, as personal representative of his late mother's estate, made at the expense of Jessica Schlesinger and her six cousins, who are not party to the lawsuit.

Those transactions included the transfer of more than \$1.6 million to the Schlesinger brothers'

Star Park, which the judge says lost \$2.9 million over the past decade; and borrowing money against a million-dollar Gearhart beach house for the benefit of business dealings that did not include Jessica Schlesinger or other beneficiaries.

"Mark has decreased the value of the Beach House Trust's sole asset, the beach house, by placing a lien on property that was previously unencumbered, and improperly using a portion of the funds in furtherance of business ventures in which neither the Estate nor the Trust held an interest," Judge Stuart wrote.

Judge Stuart found insufficient or nonexistent documentation in a variety of other transfers of money from the Bernice Schlesinger estate.

"The court has found in Plaintiff [Jessica Schlesinger]'s favor as to the bulk of the concerns she has raised concerning the proper administration of the Estate and Trusts," Judge Stuart wrote. "An award of attorney fees and costs is appropriate."

In addition to ordering the defendants to pay Jessica Schlesinger's unspecified but undoubtedly large attorney fees, Judge Stuart ordered the defendants to pay her \$884,000 to reimburse for improper transfers from the estate that would have otherwise benefited her.

In summarizing her conclusions, Judge Stuart reiterated a statement she'd made earlier at the request of the defendants.

"I found no evidence at trial to establish any dishonest or illegal business transactions conducted by the defendants," she wrote. "Additionally, I did not find evidence at trial that Barry, Mark or Paul Schlesinger undertook the business transactions at issue due to motivations of greed. The findings of the court herein need to be viewed in the context of a complex business organization and in the context of complicated family dynamics."

Having said that, the judge still took strong issue with the "failures of the Defendants to meet their fiduciary duties to the estate, the Trusts and the beneficiaries of those entities."

"As to their dealings within the context of the conduct towards the Plaintiff, the Estate and the Trusts herein, the Court has repeatedly found the Defendants to be acting in bad faith by way of their self-dealing and failure to meet their fiduciary duties to the plaintiff."

A spokesman for the Schlesinger defendants, Greg Peden of the Gallatin Group, said the only comment they would make on the case is the **following statement:**

“This is a complicated and family matter. While we do not agree with the court findings and will object and ultimately appeal, Jessica is a member of our family and we therefore remain united in our hope for a fair resolution for all involved.”



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Bitter rift over family trusts splits prominent Portland real estate family, the Schlesingers

Print (http://blog.oregonlive.com/politics_impact/print.html?entry=/2012/04/bitter_rift_over_family_trusts.html)

 (<http://connect.oregonlive.com/staff/jmanning/index.html>) By Jeff Manning | jmanning@oregonian.com (<http://connect.oregonlive.com/staff/jmanning/posts.html>)
Email the author | Follow on Twitter (<https://twitter.com/JeffmanningOre>)

on April 19, 2012 at 10:11 PM, updated April 19, 2012 at 10:55 PM

A three-year legal fight that reflected a bitter rift in the prominent **Schlesinger f** (<http://www.schlesingercompanies.com/site/news/>) family took a major turn this week when a **Multnomah County Circuit Court** (<http://courts.oregon.gov/Multnomah/>) judge sided with 25-year-old Jessica Schlesinger. She sued her father and two uncles, claiming the Portland real estate developers failed to adequately safeguard family trust funds.

Judge Diana Stuart ruled in preliminary findings and conclusions that Barry, Paul and Mark Schlesinger violated the fiduciary duty they owed to their children, who are among the beneficiaries of the trusts. As trustees, the senior Schlesingers owed a fiduciary duty to act prudently and solely in the interest of the beneficiaries, Stuart ruled.

Jessica, the daughter of Paul Schlesinger and his ex-wife Fern Winkler Schlesinger, filed the suit in 2009. Fern has filed a lawsuit of her own, seeking to foreclose on Paul's share of one of the family companies to gain what she claims is the \$640,000 he has failed to pay her as part of the 2006 divorce.

Companies controlled by the Schlesinger brothers, in turn, have also sued, accusing Fern of "malicious prosecution" and of instigating her daughter's lawsuit.

As noted by Judge Stuart, Jessica often sat alone or with just her mother on her side of the courtroom during three weeks of trial last summer while the rest of the Schlesinger clan avoided her, sitting on the opposite side of the room.

"Jessica is vindicated," said Peter Richter, the Portland attorney who represented her. "The public airing of this family's dispute is an unfortunate consequence of the Schlesinger brothers' refusal to do their duties as personal representatives and fiduciaries."

The Schlesinger family said only that the case is not over. "This case has just completed the first phase and is still open," Barry Schlesinger wrote in an email. "We are looking forward to resolving the issues during the remedies phase or at the Court of Appeals."

The Schlesingers own a portfolio of real estate and parking lots. They own land near the Oregon Convention Center on which they hope to build the enormous Convention Center hotel long sought by city and Metro officials.

The family fortune was built by Ralph and Bernice Schlesinger, who passed away in

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(<http://www.politifact.com/oregon/>)



Guide to lobbyists in Salem

(<http://gov.oregonlive.com/lobbying/lobbyists/2012/>) 4/16/14 5:07 PM

The brothers never closed the estate of their mother. Instead, they used assets from the estate to fund their business ventures without regard to the impact on the other estate beneficiaries, Stuart ruled.

The brothers borrowed \$750,000 against the family's Gearhart beach house, owned by a family trust. A "substantial" share of that money went to fund Star Park and other family businesses, Stuart found. One of the trusts covered more than \$147,000 in Paul Schlesinger's legal fees from his divorce.

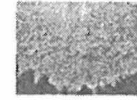
As trustees of trusts established by their parents, the Schlesinger brothers failed to meet their strict legal duty to the beneficiaries to protect and carefully account for the assets, the judge determined.

Richter brought in Portland forensic accountant Serena Morones to decipher the Schlesinger financial records. "The web of transactions was so difficult to untangle," she said. "There was income generated, there were distributions, there were huge intercompany transfers whenever it was needed."

Morones attributed the confusion more to "a complex, chaotic environment," than dishonesty. "I didn't see anything to make me believe it was motivated by greed," she said.

Judge Stuart has not yet ruled on remedies or awards.

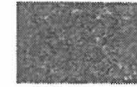
-- Jeff Manning (mailto:jmanning@oregonian.com)



Estacada fire: 'The top of the ridge was solid orange' (http://www.oregonlive.com/wildfires/index.ssf/2014/09/estacada_fire_the_top_of_the_r.html#incart_most-rear)



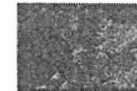
Estacada fire: 36 Pit wildfire forces residents from home, campers from campsites (http://www.oregonlive.com/wildfires/index.ssf/2014/09/36_pit_fire_a_wildfire_near_es.html#incart_most-rear)



36 Pit fire: No containment yet on smoky 2,300-acre fire that could grow some more (http://www.oregonlive.com/wildfires/index.ssf/2014/09/36_pit_fire_fire_grows_overnig.html#incart_most-rear)



Lincoln High's Theodora Mautz earns perfect ACT and SAT scores, an extremely rare feat (http://www.oregonlive.com/education/index.ssf/2014/09/lincoln_highs_theodora_mautz_e.html#incart_most-rear)



Estacada wildfire closes Highway 224; 100 firefighters battle the blaze (http://www.oregonlive.com/wildfires/index.ssf/2014/09/estacada_wildfire_closes_highw.html#incart_most-rear)

Active Discussions

- 1 Legalizing marijuana will be bad for kids: Guest opinion (http://www.oregonlive.com/opinion/index.ssf/2014/09/legalizing_marijuana_will_be_b.html#incart_most-rear) (277 comments)
- 2 Police: Man upset with barking dog shoots a neighbor's quiet one by mistake (http://www.oregonlive.com/pacific-northwest-news/index.ssf/2014/09/police_man_upset_with_barking.html#incart_most-rear) (4 comments)
- 3 Mandatory food labeling makes sense: Guest opinion (http://www.oregonlive.com/opinion/index.ssf/2014/09/mandatory_food_labeling_makes.html#incart_most-rear) (140 comments)
- 4 Oregon Ducks practice quick hits, Den...

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(http://www.oregonlive.com/today/index.ssf/2014/09/oscar_pistorius_found_guilty_o.html#incart_most-rear)

0 comments

From: Rodger Benson@mortenson.com
Subject: Fw: Portland Convention Center Hotel
Date: February 6, 2013 9:39:33 AM PST
To: lisa@needesignstudio.com

5 Attachments: 7.5 MB

Lisa ; This is HIGHLY confidential. Please don't share them with anyone. Tks, R.



Rodger Benson, LEED AP
Director of Project Development
Mortenson Construction: Building what's next.
phone 206.383.2656
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----- Forwarded by Rodger Benson/Mortenson on 02/05/2013 09:38 AM -----

From: Samantha Belanger/Mortenson
To: Rodger Benson/Mortenson@Mortenson,
Cc: Mark Wagner/Mortenson@Mortenson
Date: 02/05/2013 08:50 AM
Subject: Re: Portland Convention Center Hotel



Samantha Belanger
Estimating Coordinator
Mortenson Construction: Building what's next.
phone 425.497.6614
fax 425.376.0300
www.mortenson.com



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From: Mark Wagner/Mortenson
To: Samantha Belanger/Mortenson,
Date: 02/06/2013 08:31 AM
Subject: Re: Portland Convention Center Hotel

Original
But only the 600 key Schlesinger site

Thanx

Sent from my iPhone

On Feb 6, 2013, at 7:58 AM, "Samantha Belanger" <Samantha.Belanger@mortenson.com> wrote:

Will do.

Would these be from our original estimate or one of your updated cost models?

Thanks

<0.37E.gif>

Samantha Belanger
Estimating Coordinator
Mortenson Construction: Building what's next.
phone 425.497.6614
fax 425.376.0300
www.mortenson.com

<0.AF8.gif> Please consider your responsibility to the environment before printing this e-mail

Mark Wagner---02/05/2013 06:38:55 PM---

From: Mark Wagner/Mortenson
To: Samantha Belanger/Mortenson,
Date: 02/05/2013 06:38 PM
Subject: Fwd: Portland Convention Center Hotel

From: Rodger.Benson@mortenson.com
Subject: CONFIDENTIAL
Date: August 28, 2013 5:36:40 PM PDT
To: lisa@neodesignstudio.com

2 Attachments, 3 KB


Lisa -

Jeff and I learned today that MDI is currently planning to use someone named Design Force out of Texas for the FF&E purchasing / coordination and interior design for the hotel. It wasn't shared directly with us at the construction company and we learned it in a round about way. I don't know for sure that it's a done deal and Jeff and I are keenly intent on making sure you're involved in the project. I'm sure this is unsettling and I debated telling you without learning more. There is a meeting in September between all parties to talk about open design team positions. I'll know a whole lot more then and will keep you apprised. Don't panic yet until I learn more.

R.



Rodger Benson, LEED AP
Director of Project Development
Mortenson Construction: Building what's next.
phone 206.383.2656
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From: Lisa Marechal <lisa@neodesignstudio.com>
To: Rodger Benson <rodger.benson@mortenson.com>
Date: 08/28/2013 01:11 PM
Subject: Consultant Team

Hi Rodger:

I am assuming that at this point, ESG and Ankrum Moisan are beginning to think about the other team members.

Please recall that I proposed a food service consultant and a lighting designer. Both are DBE/WBE so will help fill that requirement for 25%. Additionally both of these disciplines have past Hyatt experience. The food service discipline worked on City Center Las Vegas and this experience coordinating a very large new construction project with massive underground systems will be very valuable.

Please let me know if you want me to forward their contact information. If we left a brochure with you back in the CJ Design Group days, their contact information is inside these materials. However can ask and send digital information on to you as well.

Lisa @ Neo

From: Jeff.Madden@mortenson.com
Subject: Re: Materials
Date: September 9, 2013 3:29:57 PM PDT
To: lisa@neodesignstudio.com

2 Attachments, 3 KB

OK. See you Wednesday when you drop off the materials.



Jeff Madden
General Manager
Mortenson Construction: Building what's next.
phone 503.423.7266
cell 503.423.7266
610 SW Alder
Suite 200
Portland, OR 97205
www.mortenson.com

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From: Lisa Marechal <lisa@neodesignstudio.com>
To: Jeff.Madden@mortenson.com
Date: 09/09/2013 02:35 PM
Subject: Re: Materials

Hi Jeff:

Rodger informs me there is a meeting the weekend of the 14th + 15th regarding flushing out the project team.

Lisa @ Neo

On Sep 9, 2013, at 1:46 PM, Jeff.Madden@mortenson.com wrote:

> Hi Lisa,
>
> Wednesday at 11am should work. What meeting next weekend are you referring to?
>
>
> <Mail Attachment.gif> Jeff Madden
> General Manager
> Mortenson Construction: Building what's next.
> phone 503.423.7266
> cell 503.423.7266
> 610 SW Alder
> Suite 200
> Portland, OR 97205
> www.mortenson.com
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>
>
>

> From: Lisa Marechal <lisa@neodesignstudio.com>
> To: Jeff Madden <Jeff.Madden@mortenson.com>,
> Date: 09/09/2013 11:56 AM
> Subject: Materials
>
>

> Hi Jeff:

> I have brochures for the upcoming meeting next weekend I need to leave with you. Can you advise of a good time tomorrow or Wednesday am to come by? Thanks.
>
> Lisa @ Neo

From: Rodger Benson@mortenson.com
Subject: Re: HQ Hotel
Date: October 28, 2013 2:37:07 PM PDT
To: lisa@neodesignstudio.com

2 Attachments, 3 KB

Last I talked to Jeff Madden we're hoping to start design in early December, although no one is convinced a referendum is not still possible. No development team meetings are currently scheduled, although if we're going to start design in December we'll need our sub consultant roster filled out soon. I'll be in Portland on Thursday and will get an update then. Don't be afraid to reach out directly to Jeff or Mike for more current information than I might have. We have so many things going right now I might not always be up to date.

R.



Rodger Benson, LEED AP
Director of Project Development
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phone 206.383.2656
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From: Lisa Marechal <lisa@neodesignstudio.com>
To: Rodger Benson <rodger.benson@mortenson.com>
Date: 10/28/2013 10:03 AM
Subject: HQ Hotel

Hi Rodger:

Wondering if you could provide me with any updates?

It is my understanding that the Multnomah County Board of Commissioners passed the IGA amendment about a month ago so am assuming that the general consensus is the threat of a referendum is likely a no go?

Would you also advise me on any scheduled development team meetings? I have a conference call with TVS tomorrow and would like to update my contact as well as get an idea of what upcoming steps are involved in flushing out the consultant team.

Thanks,

Lisa Marechal
Neo Design Studio
(503) 241 - 7749 office
(775) 360 - 4977 cell

From: Lisa Marechal <lisa@neodesignstudio.com>
Subject: **Fwd: HQ Hotel Update**
Date: October 29, 2013 5:42:04 PM PDT
To: Rodger Benson <rodger.benson@mortenson.com>
▶ 2 Attachments, 2.9 KB

Hi Rodger:

Wondering if you could find out if Jeff means design relating to the building envelope only or if he is referencing the remainder of the team as well?

I do not know him as well as I do you. Don't want to be viewed as a pest. However, if he means the whole team, it would be very helpful to know. Peter has a meeting with TVS while he is visiting family over the Christmas holiday. Depending on what Jeff means, we could use this time to develop a fee proposal.

However, if there are still too many moving parts, I don't want to rush that effort. We would need an updated program and schedule to get underway with any proposal effort. Based upon our recent exchanges, it sounds like that may be a bit premature.

When you get to town and have a chance, any additional detail you can provide would be greatly appreciated. Thanks.

Lisa @ Neo

Begin forwarded message:

From: Jeff.Madden@mortenson.com
Subject: **Re: HQ Hotel Update**
Date: October 29, 2013 3:25:43 PM PDT
To: lisa@neodesignstudio.com

Lisa, we have continued to delay much of the meetings and work we previously spoke about simply due to development delays. If all goes as currently planned, we would begin design around January 1. We will keep you posted as things progress.

Jeff



Jeff Madden
General Manager
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cell 503.423.7266
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Suite 200
Portland, OR 97205
www.mortenson.com



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From: Lisa Marechal <lisa@neodesignstudio.com>
To: Jeff Madden <Jeff.Madden@mortenson.com>
Date: 10/29/2013 09:08 AM
Subject: HQ Hotel Update

Hi Jeff:

Wondering if you can give me any kind of update on the goings on with the headquarters hotel?

From: Rodger.Benson@mortenson.com
Subject: Re: Fwd: HQ Hotel Update
Date: October 31, 2013 11:36:02 AM PDT
To: lisa@neodesignstudio.com

4 Attachments, 6 KB

Lisa - Initial design work will revolve around the site, enclosure, and structure. Interiors won't get much attention for a few months thereafter. Interior design teaming discussions will likely start taking place in December, however. I'd think a fee proposal may be appropriate in January. Of course, predicting dates is like herding cats. Everything about this project has been incredibly fluid. Once the development agreement is signed and the private sector has control things will be a lot better controlled. R.



Rodger Benson, LEED AP
Director of Project Development
Mortenson Construction: Building what's next.
phone 206.383.2656
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From: Lisa Marechal <lisa@neodesignstudio.com>
To: Rodger Benson <rodger.benson@mortenson.com>,
Date: 10/29/2013 05:42 PM
Subject: Fwd: HQ Hotel Update

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Lisa @ Neo

Begin forwarded message:

From: Jeff.Madden@mortenson.com
Subject: Re: HQ Hotel Update
Date: October 29, 2013 3:25:43 PM PDT
To: lisa@neodesignstudio.com

Lisa, we have continued to delay much of the meetings and work we previously spoke about simply due to development delays. If all goes as currently planned, we would begin design around January 1. We will keep you posted as things progress.

Jeff



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General Manager
Mortenson Construction: Building what's next.
phone 503.423.7266
cell 503.423.7266
610 SW Alder
Suite 200
Portland, OR 97205
www.mortenson.com

Please consider your responsibility to the environment before printing this e-mail.

From: Lisa Marechal <lisa@neodesignstudio.com>
To: Jeff Madden <Jeff.Madden@mortenson.com>,
Date: 10/29/2013 09:08 AM
Subject: HQ Hotel Update

Hi Jeff:

Wondering if you can give me any kind of update on the goings on with the headquarters hotel?

Rodger informed me a few months back that once METRO turns the final draft agreement over to Mortenson, that the development arm needs 45 to 60 days to run things through the traps. Yesterday I learned that the Multnomah County Board of Commissioners approved the IGA and that METRO is working on the final draft right now.

No word on when they expect to be done. Have heard that they are trying to craft the verbiage of this document to force Sondland to take issue with the entire deal rather than only the room tax rebate structure. Because there are a multitude of projects which receive some form of subsidy, this is a good strategy and could substantially diminish the odds of a referendum.

Am wondering if you can let me know when the development team plans to assemble to discuss the remainder of the consultant team? I have a conference call with TVS this week and will be asked about travel to Portland for a meeting. Not sure what the next steps are on your side so would appreciate it if you could fill in the blanks a little.

Hear from Rodger that Mortenson is getting busier. That is a good omen for all of us. The shutdown caused a development lead to pull out on another project. Am hoping that we won't be revisiting the budget drama in January so the economy can pick up a little more steam.

Regards,

Lisa Marechal
Neo Design Studio
(503) 241 - 7749 office
(775) 360 - 4977 cell

From: Rodger.Benson@mortenson.com
Subject: OCC Hotel
Date: November 12, 2013 11:49:11 AM PST
To: lisa@neodesignstudio.com

2 Attachments, 3 KB

Lisa -

I just confirmed with Jeff that Mortenson Development has worked out a deal to have Design Force design the interiors for the hotel project. I know I shared with you that I had heard a rumor that they were talking a couple of months ago. MDI and DF have done several projects together and it is my understanding they are willing to comp at risk design for the 1st several months, along with the fact some kind of cost guarantee they are willing to make on the FF&E side was apparently important to Tom.

Jeff and I would like to get together with you to discuss this issue in person. We recognize your strong Mortenson support over the past several years and want to reciprocate in some way in the future. Even though the project will be delivered design/build our development partner didn't give our construction company any kind of vote in the decision. Ankrom also had high hopes they'd be selected and has been pushing hard. We've had to share the news with them as well.

I'm a little uncertain when I'll be down in Portland next but will let you know when I do and we'll set up a time to get together.

I'm sorry for this news. I know how important this opportunity has been to you.

Rodger

PS - Do you know Design Force? Would they have any need for local representation?



Rodger Benson, LEED AP
Director of Project Development
Mortenson Construction: Building what's next.
phone: 206.383.2656
www.mortenson.com

Please consider your responsibility to the environment before printing this e-mail.

From: Rodger Benson <rodger.benson@mortenson.com>
Subject: Re: FYI
Date: November 20, 2013 4:38:09 PM PST
To: lisa@neodesignstudio.com

2 Attachments, 2 KB

Lisa -

I'm not certain what you are hoping to accomplish by writing to Tom (or David) but I'm hoping you don't do anything that would jeopardize our relationship with you. You need to know that no-one in Portland had any idea that our Development Company had committed to this other firm. I feel personally responsible for encouraging you, thinking the rest of the design team was yet to be selected. None of us locally had any idea until very recently. That internal lack of communication within our firm certainly isn't your fault and I'll take complete responsibility for apparently misleading you. You know that I would never intentionally do anything to hurt you or your firm. Our friendship is important to me and Jeff, Mike, and I are committed to finding a way to make it up to you.

I personally feel strongly that you should have had the opportunity to at least compete for a role on the project team. Unfortunately, none of us in Portland were offered a vote.

I'd still like to get together when you get back to Portland. Please call me when you're on the ground if you'd like to talk.

Safe Travels,

Rodger



Rodger Benson, LEED AP
Director of Project Development
Mortenson Construction: Building what's next.
phone: 206.383.2656
www.mortenson.com

Please consider your responsibility to the environment before printing this e-mail.

From: Lisa Marechal <lisa@neodesignstudio.com>
To: Rodger Benson <rodger.benson@mortenson.com>
Date: 11/19/2013 06:08 PM
Subject: FYI

Hi Rodger:

Thought it would be appreciated to give you some advance warning of my intentions. I will be writing Tom a letter detailing our involvement for the past ten years on the headquarters hotel. I will copy you and it has been suggested that I also copy David Mortenson.

The most difficult aspect of this unfortunate turn of events is that we were not even given a chance to meet to discuss the project or submit a proposal. I know you understand + empathize with how crushing this has been for us.

Working on this letter while traveling. Have had to organize records, notes and emails. If you would like me to, I will send an advance copy for your review. The intent is to take the high road, convey the groundwork we laid and hope that Mortenson understands our position.

Regardless of this difficult turn of events, of which I know you had no involvement with, I think the world of the group of people with your company based here in our region.

Regards,

Lisa @ Neo

From: Rodger Benson<mortenson.com>
Subject: Re: HQ Hotel
Date: January 27, 2014 10:06:15 AM PST
To: lisa@neodesignstudio.com

2 Attachments, 3 KB

Lisa -


Great to hear from you. Both the legal battle and the possible vote have greatly slowed everyone's momentum and enthusiasm for a costly fight. I don't know if the project will survive it or not. Gordon sure is tenacious, even though his position would not be good for the community.

I've met with the City of Tacoma twice about their desire for a hotel. They don't have the ability to provide much in the way of public subsidy for it. Tacoma's hotel market never has been very strong so I don't know how viable that project is either. Tom hasn't indicated whether or not he plans to respond. I should know more in the next couple of weeks.

R.



Rodger Benson, LEED AP
Project Development
Mortenson Construction: Building what's next.
phone 206.383.2656
www.mortenson.com

 Please consider your responsibility to the environment before printing this e-mail.

From: Lisa Marechal <lisa@neodesignstudio.com>
To: Rodger Benson <rodger.benson@mortenson.com>,
Date: 01/24/2014 02:51 PM
Subject: HQ Hotel

Hi Rodger:

Even though it was deeply disappointing to learn of Tom Lander's decision regarding interiors, I am almost as distressed to read about what is happening now. I did not think that Gordon would take things this far, and I am sad to read about the legal dispute.

When you broke the news to me a while back and offered to make it up to us with another project, the only comparable hotel deal I could think of would be the South Waterfront Conference Center but I suspect that is a long ways out. Today this story broke in one of my industry newsletters. If Mortenson were to pursue this with Hyatt or a comparable 4 star operator, this would be something we would be interested in.

Hope other projects are filling the hole that the Portland headquarters hotel is leaving due to the litigation.

Best,

Lisa @ Neo

[attachment "TacomaHQHotel.pdf" deleted by Rodger Benson/Mortenson]



October 14, 2014

Lisa Marechal, President
Neo Design Studio
9405 NW Skyline Boulevard
Portland, OR 97231
USA

M. A. Mortenson Company
10230 NE Points Drive, Suite 300
Kirkland, Washington 98033

main 425.895.9000
fax 425.376.0300
www.mortenson.com

Re: Oregon Convention Center Headquarters Hotel Project

Dear Lisa,

As I promised you, I further discussed your position that you are owed compensation for your support in Mortenson Development's recent pursuit of the Oregon Convention Center Headquarters Hotel project with Tom Lander. Tom discussed your position with Barry Schlesinger, Nate Gundrum, and others from our greater organization to try to better understand your position.

As we've discussed in the past, Mortenson Development prefers to work with interior design firms that have procurement arms with the ability to "guarantee" the FF&E budgets for their projects. Valiant Design out of Denver has been providing similar guarantees on most of Mortenson's past hotel development projects. Selection of an interior design firm for the OCC Headquarters Hotel Project will ultimately be made by Hyatt. You are welcome to submit your current credentials directly to Hyatt for their consideration.

We appreciate all of the work you did during the previous pursuit of this project back in 2004/2005 when Mortenson Construction pursued it with Jones Lang LaSalle as the lead developer. You might recall that Mortenson Development was in no way involved at that time and that another development team was ultimately selected to move forward with Metro. The 2012 Metro solicitation that Mortenson Development responded to was a very different RFP and the development team assembled to respond to the RFP included only two firms that were on the 2004/2005 team. The rest of the participants were all different. Interior design was not a consideration in the selection of Mortenson to develop the project and no interior design firm was represented in the proposal to Metro. Based on the above facts, Mortenson Development's position is that Neo Design Studio is not entitled to compensation associated with securing the Oregon Convention Center Headquarters Hotel development. Your mention of pursuing litigation against Mortenson to secure compensation would not be in your best interest and I'd strongly encourage you to reconsider that option.

We still value our relationship with you and are sorry we don't share the same perspective of past events. We hope that one day we will have the chance to work together and I sure you know that any form of legal action against our firm on your part would preclude that from happening.

Sincerely,

Mortenson Construction

A handwritten signature in black ink that reads "Rodger Benson". The signature is fluid and cursive, with a long horizontal stroke extending to the right.

Rodger Benson
Business Development Executive

Cc: Tom Lander, Nate Gundrum, Jeff Madden, John Nowoj

From: "David Dibo" <david@dibopartners.com>
Subject: Fw:
Date: November 17, 2014 4:10:17 PM PST
To: "Lisa Marechal" <lisa@neodesignstudio.com>
Reply-To: david@dibopartners.com

Sent from my Verizon Wireless BlackBerry

From: David Dibo <David.Dibo@centrue.com>
Date: Mon, 17 Nov 2014 17:20:13 -0600
To: 'david@dibopartners.com'<david@dibopartners.com>; David Dibo<David.Dibo@centrue.com>
Subject:

November 17, 2014

To Whom It May Concern:

Please excuse the impersonal nature of this salutation as it is unclear to me ultimately who will give Lisa Marechal the audience she deserves to discuss what she has done to move the Portland Headquarters Hotel deal to the point it is today. This is not to suggest that the excellent team in place does not have the world class capability to develop and build this long overdue project. It simply is meant to recognize the efforts of a very small company and its principal who worked tirelessly to get this project off the ground.

I leave it to Lisa to provide the details of her work. Here I only hope to shed some light on my interactions with Lisa in the relatively early stages of the deal.

I was working at the time with Peter Morris at PRM Realty; Peter was the "M" in VMS Realty in the 1980's and was a significant force in the hospitality industry then and again when he resurrected his company on a much smaller scale in the late 1990s. I was a senior vice president of the firm. I had worked with Peter on some of the most visible hotels in the country at the time including the Boca Raton Hotel and Resort, The Frenchman's Reef hotel and the Yachthaven Grande Marina in the Virgin Islands and the Santa Barbara Biltmore. (We brought in Isadore Sharp and Four Seasons as a partner/manager).

We heard about the Portland opportunity and came to Portland. We were an early bidder and suggested the master planning of the site. Lisa was impressed with our concept and contacted us. She introduced us to Barry Schlesinger. We spent considerable time with Barry and although it was too early for him to make a deal (he felt), we have tracked the many iterations of the project ever since. He was working very closely with Lisa at the time and often referred questions about the project to Lisa. I do remember speaking with Barry about the "official" role that Lisa did or did not have and being assured that, if a deal transacted that she would be compensated. He felt that as issues were so fluid at the time (which certainly turned out to be the case), that it was difficult to structure a specific agreement with Lisa. Given my experience I understood this point of view and communicated Barry's rationale to Lisa.

It's been a very long time and I cannot recount all dates, times and all discussions

What I do know was that Lisa Marechal was the person who stayed with the deal, navigated it through its many different iterations and made it her business to find the "missing link" in the deal. In other words, when the deal needed a developer/land owner to control the site, she found Barry, when it needed a hotelier she reached out to Hyatt and when it needed someone with in the caliber of Mortenson to be its developer/builder, she made it her business to make sure Mortenson was at the table.

In my world we asked ourselves one simple question-especially in a world where all the big players and Wall Streeters generally know of the big deals. "Who was it that made the deal happen?" Who was it that, without that person we (VMS, PRM, WRIT (the Washington Real Estate Investment Trust for which I was the assistant to the president) would not be here?

For the Portland Hotel deal, that person was Lisa.

Times have changed. I miss some of the opportunity for the smaller unlikely intermediaries to make a big deal happen. But this did happen before and I believe there will always be the space for a bright tenacious intermediary to make this happen. For the Portland Headquarters Hotel, Lisa was there and procured the deal for all the those that have the vision to move the project toward its execution and conclusion.

Please feel free to e mail me at david@dibopartners.com, if you would like to discuss anything in more depth. David Dibo

David B. Dibo
Senior Commercial Relationship Manager
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From: david brubaker <dbrubaker42@gmail.com>
Subject: Re: Reminder
Date: November 12, 2014 9:44:45 AM PST
To: Lisa Marechal <lisa@neodesignstudio.com>

Dear Lisa

This letter will confirm that I recommended to you Mortenson Construction as the Contractor teammate for the 2004 Portland Convention Center Hotel project. I had previously had a good experience with them on a proposal for the expansion of the Spokane Convention Center. I believe them to be a company with an honorable corporate culture, ie, you can do a handshake deal with them and they will follow through to the letter. So I arranged for you an introduction to Mr. Rodger Benson, Vice President for New Business Development. One of the reasons I recommended them, besides previous hotel experience, was because they had a separate commercial development division headed by Mr Tom Landers which would be capable of "front-ending" associated start up costs on a project of this kind. WE all worked very hard and put together a superior proposal for a site owned by a business associate of yours, Mr Barry Schlesinger, that was across the street from the Portland Convention Center. Unfortunately, our proposal was not selected by the Portland Development Commission

David A. Brubaker
President
Redevelopment Consultants, LLC

On Mon, Nov 10, 2014 at 7:51 PM, Lisa Marechal <lisa@neodesignstudio.com> wrote:
Hello Guys

Need those notes please. Have to get correspondence out in the next few days.

Thanks,

Lissa

From: Rick Schmidt <rschmidt@cwisdom.com>
Subject: Portland HQ Hotel solicitation history
Date: November 11, 2014 12:30:57 PM PST
To: Lisa Marechal <lisa@neodesignstudio.com>

Dear Lisa:

Here is a little history on our pursuit of the hotel project:

We were introduced back in 2003 by David Brubaker, whom Conventional Wisdom had met from our work in Tacoma and had worked with in proposing several small-market hotel/conference centers. Over the next 18 months, we had any number of phone conversations regarding assembling a development team – you were instrumental in assembling the site and the hotel operator, and CW brought Skidmore Owings & Merrill into the project as lead designers. This went on for over a year as the Portland Development Commission and its consultants were finalizing its Request for Proposal, terms and conditions, and as the economy was whispering about the downturn with financing becoming unpredictable.

We had several meetings in Portland to finalize control of the site alternative to PDC's solicitation, which resulted in a better project without public subsidy, both of which came from CW's lessons learned from projects in Puerto Rico and Overland Park, Kansas. It seemed only public outcry or maneuvering by other teams could derail our project, but I'm sure the economy was what ultimately stopped the project at that time.

Neo Design was CW's only point of contact throughout the advance work, teaming and final preparations for the response to the RFQ, and was intimately involved in all parts of planning for the mixed use development.

Richard A. Schmidt, AIA, President
Conventional Wisdom Corp.
2703 REW CIRCLE
OCFEE, FL 34761-2991 USA

a Roper Levett Bucknall company

www.cwisdom.com

Phone: +1 407 905 0002

Fax: +1 407 905 9611

Mobile: +1 407 808 7754

Parsons, Susan

From: Lisa Marechal <lisa@neodesignstudio.com>
Sent: Monday, October 05, 2015 4:21 PM
To: Parsons, Susan
Subject: [User Approved] Request to speak under communications at City Council Meeting

Hi Susan:

I hope that I am doing this correctly:

Lisa Marechal
(775) 360 - 4977 cell
Topic: Headquarters Hotel

If you would send me any guidelines, I would appreciate it. I will drop some materials off with your office next week.

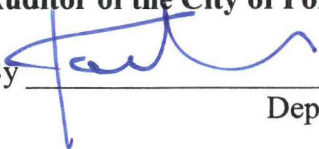
Request of Lisa Marechal to address Council regarding Headquarters Hotel
(Communication)

OCT 14 2015

PLACED ON FILE

Filed OCT 09 2015

MARY HULL CABALLERO
Auditor of the City of Portland

By 
Deputy

COMMISSIONERS VOTED AS FOLLOWS:		
	YEAS	NAYS
1. Fritz		
2. Fish		
3. Saltzman		
4. Novick		
Hales		