ALUM ROCK UNION ELEMENTARY SCHOOL DISTRICT

BOARD OF TRUSTEES



Special Board Meeting

March 30, 2023

Thursday, March 30, 2023
SPECIAL BOARD MEETING AGENDA

Type: SPECIAL BOARD MEETING AGENDA
Time: 6:30 pm
Code: Special #18-22/23
Location: ALUM ROCK UNION ELEMENTARY SCHOOL DISTRICT, 2930 Gay Avenue, San Jose, CA 95127; Board Room.

In compliance with the Americans with Disabilities Act, if you need special assistance in order to participate in the public meeting of the Board of Trustees, please contact the Office of the Superintendent at (408) 928-6822. Notification 72 hours prior to the meeting will enable the District to make reasonable accommodations.

THE MEETING WILL BE AVAILABLE FOR VIEWING LIVE VIA ZOOM WEBINAR MODE AND CAN BE ACCESSED AS FOLLOWS:
Join Zoom Meeting: https://arusd-org.zoom.us/j/89457787083
Webinar ID: 894 5778 7083
Or One tap mobile:
+16699006833,,89457787083# US (San Jose)

THE MEETING MAY ALSO BE VIEWED THROUGH LIVE STREAM AS FOLLOWS:
1. Live stream Youtube English Channel "AlumRock TV"
https://www.arusd.org/alumrocktv

*********PUBLIC COMMENT WILL BE ONLY IN PERSON: NO PUBLIC COMMENT WILL BE AVAILABLE THROUGH ZOOM*********

Members of the public shall have an opportunity to address the Board of Trustees on the agenda items identified below. (Government Code Section 54954.3)

1. OPEN SESSION - CALL TO ORDER AND ROLL CALL

1.01 CALL TO ORDER/ ROLL CALL/LAND ACKNOWLEDGMENT- Board of Trustees of the Alum Rock Union Elementary School District does hereby acknowledge that the District schools and facilities sit on the traditional lands of the Muwekma Ohlone people, and the Board of Trustees further acknowledges with respect and reverence the Muwekma Ohlone People Tribe of the San Francisco Bay Area for their stewardship of these lands; PLEDGE OF ALLEGIANCE -- PRESIDENT MINH PHAM.

2. SUPERINTENDENT/ BOARD BUSINESS -- BOARD DISCUSSION AND/OR ACTION (The Board may take action on any item in this section, unless it is designated for information only.)

2.01 Interviews of Potential Firms for Feasibility Study and selection of desired firm.

2.02 Approve Transportation Plan for Fiscal Year 2022-2023.

3. CONSENT CALENDAR --BOARD DISCUSSION AND/ OR ACTION (The Board may take action on any time in this section, unless it is designated for information only.)

3.01 Approve Memorandum(s) of Understanding.

4. CLOSED SESSION

4.01 RECESS TO CLOSED SESSION: The Board will recess to Closed Session at approximately 7:00 p.m. Open Session will resume at conclusion of Closed Session.

4.02 ANNOUNCEMENT AND PUBLIC COMMENTS REGARDING ITEMS TO BE DISCUSSED IN CLOSED SESSION (Government Code Section 54957.7).

4.03 PUBLIC EMPLOYEE DISCIPLINE/DISMISSAL/RELEASE/NON-REELECTION (Government Code Section 54957).

4.04 CONFERENCE WITH LEGAL COUNSEL—EXISTING LITIGATION (Paragraph (1) of subdivision (d) of Section 54956.9), Case: Office of Administrative Hearings (Oakland) case no. 2023030398 (Certificated employee dismissal proceeding).

5. RECONVENE TO OPEN SESSION

5.01 REPORT OF ACTION TAKEN IN CLOSED SESSION.

6. ADJOURNMENT

6.01 President adjourns the meeting.

2.01

ALUM ROCK UNION ELEMENTARY SCHOOL DISTRICT
2930 Gay Avenue
San José, CA 95127

Office of Superintendent of Schools

ITEM REQUIRING ATTENTION – BOARD OF EDUCATION

To the Board of Trustees:

Subject: Interviews of Potential Firms for Feasibility Study and selection of desired firm.

Approval

Submitted by: Hilaria Bauer Title: Superintendent

To the Board of Trustees: Meeting: March 30, 2023
Special Board Meeting

Approval

2.01
Agenda Placement

Hilaria Bauer, Ph.D., Superintendent

DISPOSITION BY BOARD OF TRUSTEES

Motion by: _____ Seconded by: _____

Approved: _____ Not Approved: _____ Tabled: _____



STATEMENT OF QUALIFICATIONS AND PROPOSAL

DCG STRATEGIES FOR DEVELOPMENT OF FEASIBILITY STUDY REGARDING WORKFORCE HOUSING

IN RESPONSE TO ALUM ROCK UNION SCHOOL DISTRICT'S RFQ/RFP NO. 2223-BONDS25

DCG Strategies, Inc. 7600 Dublin Blvd., Suite 275, Dublin, CA 94568

P 925.479.1350 | F 925.241.4212 | E connect@dcgstrategies.com | DCGStrategies.com | BRE#01521674

DCG STRATEGIES

real estate. *real solutions.*

JANUARY 18, 2023

Alum Rock Union School District
2930 Gay Avenue, San Jose, CA 95127
Attn: Kolvira Chheng, Assistant Superintendent of Business Services

DEAR KOLVIRA,

DCG Strategies, Inc., is pleased to provide this proposal in consideration for providing real estate consulting services, specifically for development of a feasibility study regarding workforce housing, to Alum Rock Union School District. DCG Strategies ("DCG") specializes in serving the real estate needs of education-based organizations, and regularly provides real estate services and consulting for California school districts.

What separates DCG from most other firms is our deep understanding and experience providing the specialized real estate services needed to accommodate the structure and constraints of public education institutions. DCG realizes that the best solution often takes time, out-of-the-box thinking, and is always driven by our client's mission, not necessarily the highest profit or quickest resolution.

In this proposal, you will see that DCG has been engaged by a number of California school districts to provide real estate services, and specifically, consulting services for educator and workforce rental housing. We have worked with a number of school districts to identify solutions and opportunities for their districts as they explore the feasibility of providing housing to their employees. We are currently working with San Mateo Union High School District, Milpitas Unified School District, Oakland Unified School District, San Rafael City Schools, Hayward Unified School District and more on the same scope of services being requested via this RFQ/RFP. Over the past 17 years, our team has worked with more school districts in service of their real estate needs than any other firm in the state.

In good standing with the California Department of Real Estate, BRE#01523674, our team is made up of full-service consulting, property planning and commercial real estate professionals, but our passion lies in bringing education, hope and healing to area communities by helping our clients realize the full potential of their real estate assets.

We welcome the opportunity to provide additional information that may be helpful, and look forward to the opportunity to be of assistance to you on your real estate needs. As the Chief Executive Officer of DCG Strategies, I am authorized to submit this proposal on behalf of the firm.

Sincerely,

Landis Graden
Chief Executive Officer
DCG Strategies, Inc.
BRE# 01461409
P: 707-304-4340 | E: LGraden@dcgstrategies.com

TABLE OF CONTENTS

TAB 1 – LETTER OF INTEREST....2

TAB 2 – TABLE OF CONTENTS....3

TAB 3 – EXECUTIVE SUMMARY....4

TAB 4 – PROPOSED PERSONNEL....6

TAB 5 – NARRATIVE....13

STATEMENT OF SERVICES....13

PROPOSED SCHEDULE OF SERVICES....17

FIRM INFORMATION....17

PRIOR RELEVANT EXPERIENCE....20

TAB 6 – ADDITIONAL DATA....23

TAB 7 – FIRM'S CURRENT WORK COMMITMENTS....24

TAB 8 – COMPENSATION....25

FORM OF AGREEMENT....28

EXECUTIVE SUMMARY

As a certified Benefit Corporation, DCG specializes in providing comprehensive real estate and land use services to education institutions. In this proposal, you will see that DCG has been engaged by a number of California school districts to provide real estate services, including consulting services to analyze their real property assets in determining the feasibility of using them more effectively and efficiently in pursuit of both fiscal sustainability and the realization of key district initiatives. Throughout the last few years, we have seen a rise in need for development consulting services and in particular, the development of workforce housing.

DCG regularly conducts briefing and training for County Offices of Education and individual public school districts on how school districts can more effectively manage their real estate, including how to turn your real estate assets into resources for your students. With over 17 years of experience serving public school districts, our team has a deep understanding of the California Education Code and the requirements placed upon public school districts as it relates to their real property. Below is a brief summary of our experience related to the scope of work in the RFQ/RFP.

WORKFORCE HOUSING

As you will read, DCG Strategies has completed workforce housing feasibility studies for numerous school districts throughout the Bay Area. A sample of these include: Burlingame School District, Fremont Unified School District, Santa Cruz City School District, South San Francisco Unified School District, West Contra Costa Unified School District, Milpitas Unified School District and more.

DCG is uniquely experienced at assembling the full team of consultants needed to complete a project based on the site and District needs. Examples of District needs include: bond counsel to consider the feasibility of incorporating development construction costs into the next school bond, to reaching out to the local development community to determine if there is an opportunity for a mixed-market rate project which would meet the District's unit count and affordability objectives while simultaneously reducing cost and risk.

Our role is to serve as the District's Owner Representative and to arm the District with data to feel confident in their decisions, whether the District is looking to fund the construction of housing on a district-owned site, or purchase an already developed and existing real property asset. In either scenario, our approach is to examine site options from a physical and financial feasibility standpoint first, and if/when a site is identified as viable, perform a deeper due diligence on the property.

This includes performing a market study and demographic analysis to assess market demand from employees for the project, and completing a land use analysis and yield study to arrive at a realistic number of units. From here, our team will move forward with an in-depth feasibility study including detailed site planning and financial modeling. Should the District decide to move forward with the development, our team is equipped to lead the process for obtaining the necessary governmental approvals for the project.

In this manner, the District is guided throughout the process to assess employee needs, present project updates to the Board, receive the required governmental approvals and much more. Our experience with school district real estate, teacher housing legislation and the Education Code, provides a lens through which we approach determining the feasibility of providing housing for district employees.

Our team provides comprehensive real estate and other ancillary services as deemed important by district leadership, as well as work on specific projects. If selected to represent Alum Rock Union School District, DCG will work with your District leadership and other key stakeholders to create a comprehensive work plan that would optimize the cost-effective nature of the site analyzed, while also meeting the goals and objectives of the District, the County of Santa Clara, nearby communities and other key stakeholders.

PROPOSED PERSONNEL

DCG's team consists of in-house consultants, advisors and brokers who are each licensed to perform the necessary real estate services required by the RFQ/RFP. DCG Strategies, BRE#01523674, is licensed to perform real estate transactions in California and to conduct business throughout the State.

Lauren Jennings, our Vice President of Operations, would serve as the designated project manager and primary contact for the District, responsible for the completion of all project components and deliverables. Landis Graden, the Principal-in-Charge, will serve as the designated state and local agency advocate and Carl Morabito, our Vice President of Real Estate Development Services, will oversee the development site analysis.

Our firm takes a team approach to each project and, as such, are able to bring the best minds of brokerage, development and consulting to each of our projects. DCG has operational systems in place that allow us to manage a continual increase in clients and projects. We increase our staff as needed, and are confident that the current workload and availability of staff will accommodate the needs of Alum Rock Union School District. DCG Strategies, and the personnel included herein, are available to provide the Services as requested in the RFQ/RFP.

The following pages include our Key Team member resumes.



LANDIS GRADEN

FOUNDER, PRESIDENT & CHIEF EXECUTIVE OFFICER

Landis Graden is President, Chief Executive Officer and Founder of DCG Strategies. Landis is a serial entrepreneur having founded over 10 companies. Most recently, he is a Co-Founder and Board Member of United Tech Cities, a non-profit organization focused on preparing underrepresented youth and young adults for fulfilling careers in STEAM fields.

In 1997, Landis founded Penn & Graden Properties, a residential properties acquisition company, leaving behind a very successful career at a Fortune 500 company. At Penn & Graden, Landis managed multiple real estate investment groups that were focused on acquiring, rehabilitating, and selling undervalued Bay Area properties, all of which resulted in positive returns for investors.

Landis currently serves on the Executive Board of Alignment Bay Area, the Advisory Board of the Solano African American Chamber of Commerce and has served prior as Board Member on the Vallejo Chamber of Commerce, Board Member for the Community Democratic Club of Solano County, Board Member for East Oakland Community Development Corporation, Board Member of Brighter Beginnings, Board Member of Glad Tiding's Community Development Corporation and the City of Hayward's Economic Development Committee.

As past Chair of the City of Vallejo's Planning Commission, Landis blends his business acumen with a local grasp of his community's needs and values. Fusing opportunity, understanding, and experience has enabled Landis to pursue projects that strengthen the community's economic base, attract new business and jobs, and work towards a sustained, healthy, robust future for the coming generation.

Landis currently coaches youth basketball and is an engaged and active member of his local community. Landis earned a Bachelor of Science Degree in Information Systems Management from the University of San Francisco, an MBA from Holy Names University and is currently pursuing a Master's of Divinity from Claremont School of Theology.

BRE #01461409



LAUREN JENNINGS

VICE PRESIDENT, OPERATIONS

Born and raised in Oakland, California, Lauren Jennings is passionate about supporting and creating communities of value and the advancement and empowerment of women. A graduate of Cornell University, Lauren is the Vice President of Operations at DCG Strategies and is responsible for the strategic implementation of daily business operations.

Lauren has invested significant time in volunteer and leadership activities over the years, including mentoring high school young women to build their self-esteem and empower them to fulfill their highest potential. Currently, Lauren serves as Worship Leader for Kingdom Builders Christian Fellowship in Oakland.

She serves on the board for the Cornell Hotel Society, Northern California Chapter and recently finished her term as 2020 President of CREW, East Bay, an organization dedicated to enhancing professional growth and business opportunities for women in commercial real estate. Lauren was nominated for and recognized in 2017 as a Rising Rockstar, an award given to exceptional women, thirty-five years and younger, who are influential, dynamic and show early promise as an industry leader.

Lauren is a member of and volunteers with Alpha Kappa Alpha Sorority, Incorporated and the Cornell Alumni Admissions Ambassador Network. Lauren earned her California Department of Real Estate License in 2015.

BRE # 01975174



CARL MORABITO

VICE PRESIDENT, REAL ESTATE DEVELOPMENT SERVICES

As DCG's Vice President of Real Estate Development Services, Carl works closely on large-scale development projects and supports DCG's mission and clients in all aspects of residential and mixed-use development. With Carl's knowledge and expertise, DCG is able to provide our clients with valuable development strategies.

As a veteran of the development community, Carl has managed residential and mixed-use projects throughout California since the mid 1990's. He has run divisions for large home builders in both Northern and Southern California and is passionate about providing housing for families and creating a strong sense of community in the neighborhoods he has developed and teams he has led.

Carl resides in the Bay Area with his wife and family. He holds a Bachelor of Science degree, with an emphasis in Entrepreneurship, from the University of Southern California.



MEGAN MACIVER

STRATEGIC ADVISOR, REAL ESTATE STRATEGY

Megan MacIver joined DCG Strategies in 2022 as serves as Strategic Advisor for Faith Based and Commercial Markets. In her role, Meg oversees strategic projects and real estate strategy for DCG's clients.

Prior to DCG, she led the Sales and Marketing team at The Signal Group, a diversified shipping services group with offices in London and Athens. In addition, Ms. MacIver served as a Vice President in the International Capital Group at Jones Lang LaSalle (NYSE: JLL) in New York, where she launched and led JLL's Portfolio Advisory Service, a boutique acquisition advisory consultancy that evaluates and executes portfolio investments into the U.S. on behalf of foreign institutional investor clients.

In that role, she led deal sourcing, market analysis, financial analysis, lease review, and closing on more than $1 billion of commercial real estate transactions across the office, industrial and retail sectors. Her clients included leading global institutional investors including major European Insurance Companies, Sovereign Wealth Funds as well as Family Offices.

Prior to joining JLL, Ms. MacIver was Investor Relations and Marketing Associate at CIP Capital and worked as an Urban Planning Associate at Project for Public Spaces, an international urban planning, education, and advocacy firm for grassroots-led public space development.

Ms. MacIver is a Candidate for Ordination in the Metropolitan New York Synod of the ELCA (Evangelical Lutheran Church in America) and is working towards the completion of her Master's of Divinity Degree at The Jesuit School of Theology in Berkeley, California. She is the Field Education Student at St. Mark's Lutheran Church San Francisco where she leads the congregation's Children's Ministry.



CORT GROSS

AFFORDABLE HOUSING & FINANCIAL CONSULTING SERVICES

Cort Gross joined DCG Strategies in 2020 and brings a wealth of community development finance experience to the team.

Most recently serving as Executive Director and Senior Banker at JPMorgan Chase Community Development Bank, with a focus on affordable housing finance, Cort brings with him over 30 years of finance consulting and a true passion for working with faith-based entities.

Previously, Cort has worked with Self-Help Federal Credit Union on business development in California, as well as a host of other firms consulting on community asset management and development, community-based investment, and the financing and development of real estate.

In addition, he was the prior Chief Financial Officer of nonprofit housing developer BRIDGE Housing Corporation, Vice President of Affordable Housing with mortgage banker TRI Capital Corporation, and Program Manager for Lending with nonprofit financial intermediary the Low-Income Housing Fund.

He chairs the finance committee of Mandela Partners, a food justice business incubator in West Oakland, and serves on the Executive Credit Committee of the Nonprofit Finance Fund, a national CDFI. A former Coro Fellow in public affairs, Cort received his A.B. in history at Stanford University and his M.Div. Degree in liberation theology at Yale University.



RACHAEL MOY

PROJECT COORDINATOR

As a Project Coordinator, Rachael provides administrative support throughout all aspects of DCG and brings over 10 years of hospitality and operations experience to the team.

Rachael began her career honing in her skills in customer service and hospitality working with Starbucks for over ten years. As a certified barista trainer, Rachael served as a guiding force and mentor for baristas and shift supervisors. She sequentially worked for Crate and Barrel as a Merchandising Manager where she consistently looked for and collaborated on creative solutions to retail challenges in the dynamic and ever-changing market.

Rachael is passionate about giving back and is excited to bring functional solutions to community-oriented organizations. Rachael received her Bachelor of Arts in Psychology with a Minor in Advertising from California State University East Bay.

STATEMENT OF SERVICES

SERVICES FOR EDUCATION INSTITUTIONS

DCG Strategies has years of experience providing real estate services to California school districts. While most school districts and academic institutions understand and appreciate the benefits of Real Property Assessments, they often lack the time and resources to successfully manage the long, complicated, and controversial process from beginning to end. The experienced DCG team works closely with clients to ensure prudent planning, clear communication, timely action, and efficient management of all projects. Our consulting, asset management, brokerage and development services have helped our school district clients:

- Realign assets to better serve the overarching educational mission
- Realize operational efficiencies as a key strategy to fiscal sustainability
- Identify leasing opportunities to bring in passive investment income
- Create "win-win" community partnerships with other public and private entities

DCG is a full-service consulting, development, brokerage and commercial real estate company that specializes in partnering with community-based organizations. We are committed to assisting Alum Rock Union School District on their various real estate needs as identified in the RFQ/RFP. Whether your organization has a need to evaluate underutilized or surplus land, acquire or sell real property, lease or rent property, develop employee housing, or any other consulting or real estate related service, DCG has the needed experience to manage the real estate process from land use analysis, valuation, strategic planning, brokerage and asset management services. We have experience with all property types, including institutional, commercial, residential, industrial and mixed use.

DCG has assisted many districts with analyzing the feasibility of providing below market rate housing to their employees. Below, we have outlined our approach to each step of the process as identified in the RFQ/RFP. The goal of our work with each client is to holistically analyze the District's opportunities in a way that minimizes risk, incorporates community and staff input and maximizes the use of underutilized properties.

PROPOSED SCOPE OF SERVICES

Based on the District's goal of exploring the feasibility of developing workforce housing within the District boundaries, DCG's proposed scope of services will include the completion of a full employee housing feasibility study. Based on the number of sites included, DCG recommends a phased approach, broken out into two initial phases. With this phased approach, our team is able to examine site options from a physical feasibility standpoint first, and if/when a site is identified as viable, perform a deeper due diligence on the property(ies). In this manner, the District is guided throughout the process and resources are only spent as necessary.

The first phase will consist of an initial, high-level overview of district assets to first determine the optimal site(s) for workforce housing and confirm viability of a potential project.

Should one or more sites be identified as preliminarily feasible, the second phase will involve a market assessment to assess demand for employee housing, a site assessment to determine the optimal site for

development including unit count and product type, a review of affordable housing rates in connection with district employee salary levels, a financial analysis to determine feasible project revenues and expenses, and an analysis on funding options for development.

The following scope lays out DCG's proposed approach.

PHASE I

PROJECT SCOPING SESSION WITH DISTRICT

- Meet with the District to confirm our understanding of project goals, review the project schedule, discuss expectations of the planning process and work products
- Meet with staff to gain background on community relations, relationships and policy guidance for the District's properties to be analyzed

SITE OVERVIEW

DCG will complete a high-level analysis of either all sites, or any sites identified by the District, with the goal of determining the preliminary development potential of each. Our approach will be to complete an independent investigation of development potential. We will analyze the preliminary feasibility of constructing workforce housing on each site analyzed and develop an overall strategy on how to use each asset to support the goals and vision of the District.

DATA COLLECTION

Our team will undertake a data gathering effort to collect pertinent information related to the properties identified to include, but not necessarily be limited to:

- General Plans and Zoning Ordinances
- Specific and/or concept plans
- Development standards
- Design guidelines
- Outside previous legal analysis and consultant reports

SITE VISIT

Our team will drive the surrounding area and neighborhood to identify existing conditions relevant to the project. Key issues to be assessed during this trip will include the locations, conditions, and relationships of current and planned land uses; the relationships between land uses and the existing and planned transportation infrastructure; and the relationships between the project site and the surrounding properties. We will then synthesize all contextual influences and present opportunities and constraints.

MARKET STUDY

Our team will review the San Jose and surrounding market. This will be a critical part of fully evaluating the opportunities for each property and accurately estimating values. The market study incorporates data from neutral third-party sources to determine key information such as:

- Population trends including population and job growth,
- Economic conditions including household income and unemployment rates, and

- Housing costs - including key market needs, rental rates, closing prices and new home versus resale rates.

CAPACITY REVIEW

An initial capacity study will assess the opportunities, constraints and development for each site identified. As part of this initial phase, a capacity study will present a preliminary visual representation of development potential to inform the options for potential development. The main criteria we consider are:

- Site orientation
- Setbacks
- Nominal street sizes
- Variable unit sizes
- Unit sizes
- Slopes, if any
- Parking requirement

PRELIMINARY FINDINGS

A Memorandum will be developed to detail our findings including development potential and disposition options. The memorandum will be informed by the Land Use Analysis, Capacity Study and holistic Strategic Analysis to provide data and options for the District. These options will ultimately be provided to the District to be able to make informed decisions regarding next steps and be able to successfully execute on those decisions.

PHASE II

When and/if a site(s) is determined to have development potential and is determined to be initially feasible for workforce housing, DCG's analysis will move to Phase II. This phase includes performing a market study and analysis to assess market demand from employees for the project, and completing a land use analysis. From here, our team will move forward with an in-depth feasibility study including detailed site planning and financial modeling.

The following scope lays out DCG's proposed approach.

MARKET ASSESSMENT

While this step can be included in the first phase, DCG typically recommends completing this only after a viable site option has been identified. The goal here is to obtain an accurate assessment of demand for district housing, as well as review potential rental rates that would be supported by the market. As the target market in this instance is district employees, a market assessment would include an employee questionnaire surveying district employees' interest in district housing, as well as a review of employee salary levels.

EMPLOYEE QUESTIONNAIRE

To inform the connection between housing and gain an accurate picture of demand, DCG recommends an online employee survey of current housing situations, income allocated to housing, commuting, and the impact that maintaining a sustainable living situation has on continued employment with the District. While the survey will be distributed by the District, DCG will produce, manage and review the survey and

results. The results of the survey will provide insight into how many units are needed for the project, as well as the type of units. This will aid in confirming the recommended size of land space needed for the development.

EMPLOYEE SALARY SCHEDULES

While each district employee housing project must be evaluated based on its unique site characteristics and is informed by a district's housing affordability objectives, there are a few general parameters for district employee housing projects. Generally, districts try to keep rental rates at a predetermined percent of market rate without income restrictions for tenants, however, employee rental rates could also be based on district employee income levels.

DCG will review current and projected salary schedules, as provided by the District, and analyze these in relation to the financial feasibility of the housing project. This will provide an output on rental rates, based on unit size and unit mix, to be used in the forthcoming financial analysis.

SITE ASSESSMENT

In addition to assessing the market, the second step is to complete a deeper analysis on the optimal site(s) to construct the housing on. This further study will incorporate the findings of the employee survey, analysis of potential for rezone, a yield study on the site(s), along with a site plan and development budget on the site(s) determined to be the most optimal.

DCG will also investigate the potential for collaborating with other nearby school districts and/or public agencies to provide said housing or financing via a Joint Powers Authority or other legal entity.

FINANCIAL ANALYSIS

A financial analysis will be performed to determine preliminary development costs and financing gaps. A financial analyst will determine project feasibility including construction costs, potential rental rates and gap funding requirements. DCG is able to work with the District's current financial analyst on this, or build this into our scope of services.

Based on the aforementioned financial analysis and modeling, DCG will further provide the realistic development opportunities available to the District based on the selected site(s) and options to best address the likely funding gap between costs of development and typical available funding sources for workforce housing projects. This could include an estimated analysis and valuation of other existing assets for possible sale to fund the financing gap.

PRELIMINARY FINDINGS & REPORT

At the completion of Phase II, DCG will prepare a report of our preliminary findings. This will include which of the sites present viable options for housing and which sites could be sold to fund construction of housing. The report could also include a recommendation on the best use of each asset based on revenue projections, as well as recommendations regarding the development of employee housing (including how to fund construction and projected revenues), and estimated timeline and projected revenues.

The report will be provided to staff for review and comment. Our team will then prepare a board memo summarizing the key findings and recommendations for presentation to the Board.

PROPOSED SCHEDULE OF SERVICES

While the number of sites included for the initial assessment in Phase I will ultimately affect the final timeline, based on DCG's current knowledge of the project, DCG anticipates completed the above proposed services within 4 to 6 months. Below is an estimated schedule for each of the above services, based on selection of firm occurring Thursday, February 9, 2023.

Task	Duration	Est. Due Date
Project scoping session with district staff	1 hour – scheduled at onset of project, based on staff availability, typically no later than two weeks from contract approval	2/15/2023
Phase I services – initial site overview	Depending on the number of sites analyzed, DCG anticipates completing Phase I within 7 to 8 weeks. This phase includes assessment of sites and production of a draft report for staff review.	4/12/2023
Presentation to Board	Depending on District preference, presentation of initial findings to staff/Board	5/1/2023
Phase II services – assuming site viability is determined	12 to 14 weeks	
Employee survey – creation and finalization	2-3 weeks for DCG to create the survey, send to staff for review and staff to approve distribution of the survey	5/15/2023
Employee survey distribution and response receipt	Survey is typically open for 21-30 days depending on employee response rate	6/15/2023
Review employee salary schedules	10 days – DCG internal task	
Site assessment	7-8 weeks (based on final number of sites selected) – this will be concurrent with employee survey	7/15/2023
Financial analysis	4-6 weeks – concurrent with site assessment	7/15/2023
Preliminary findings and report	2 weeks to produce draft report for staff review	8/1/2023
Presentation to Board	Based on board schedule	8/15/2023

FIRM INFORMATION

ABOUT DCG STRATEGIES

Over a decade ago, successful real estate professional, Landis Graden, believed in the importance of giving back to the community through public service. He recognized that organizations providing support and resources to local communities all too often faced limited or declining revenues. So, in 2005, Landis formed DCG Strategies, Inc., a registered Benefit Corporation, private S Corporation, and real estate firm that provides these specialized clients with the knowledgeable, caring expertise they need to create healthier, more sustainable real estate management strategies.

For 17 years, DCG Strategies has been a team of real estate professionals who puts people before property or profits. As specialists in managing real estate assets for education-based institutions, our people

understand that the traditional rules of real estate change when viewed with an eye toward strengthening your community.

In good standing with the California Department of Real Estate, BRE#01523674, our ten-person team is made up of full-service consulting, property planning and commercial real estate professionals, but our passion lies in bringing education, hope and healing to area communities by helping our clients realize the full potential of their real estate assets.

The team at DCG offers a wide range of services to guide you through the often-complex world of non-traditional real estate management. Unlike standard commercial real estate agencies, we respect the collaborative focus that's unique to community-driven organizations like Alum Rock Union School District and we adapt our approach accordingly to create the best possible solution for your needs.

A small sampling of the academic institutions we've assisted over the past 17 years include:

- Alameda County Office of Education
- Albany Unified School District
- Acalanes Union High School District
- Azusa Unified School District
- Burlingame School District
- Campbell Union High School District
- Chabot-Las Positas Community College District
- East Side Union High School District
- Fremont Unified School District
- Hayward Unified School District
- La Mesa-Spring Valley School District
- Larkspur-Corte Madera School District
- Livermore Valley Joint Unified School District
- Milpitas Unified School District
- Monterey Peninsula Unified School District
- Napa Valley Unified School District
- New Haven Unified School District
- Newark Unified School District
- North Monterey County Unified School District
- Norwalk-La Mirada Unified School District
- Oakland Unified School District
- Peralta Community College District
- Pittsburg Unified School District
- Pomona Unified School District
- Rescue Unified School District
- Rincon Valley Union School District
- Riverside County Office of Education
- San Lorenzo Unified School District
- San Mateo Union High School District
- San Rafael City Schools
- Santa Cruz City School District
- Solano Community College District
- Soledad Unified School District
- South San Francisco Unified School District
- Twin Rivers Unified School District
- Vallejo City Unified School District

MISSION & VALUES

DCG Strategies is an alternative to conventional real estate firms with a distinct mission to serve California's community-benefit organizations. DCG was founded under the premise that we could seek profits while also building value within our community. Our founder and employees have always believed that working at DCG is about building something bigger than ourselves.

DCG has adopted the Benefit Corporation designation and become independently certified as a socially responsible corporation. DCG joins the growing movement of companies across the United States, as well as globally, who see part of their corporate responsibility as contributing to a positive impact on society and the environment. The Benefit Corporation designation is a natural extension of our vision; that by optimizing opportunities and resources for our community-based clients, we can help create long-term gains that

benefit and strengthen the communities we serve. We eagerly undertook the Benefit Corporation process to ensure our firm's operations, management practices and governance were at the highest levels and to place us in the best position possible to effect change to benefit our community, our environment, our stakeholders and our clients.

Hiring DCG as a Real Estate Consultant is like choosing a dedicated partner who puts you first. The professionals at DCG believe that finding the perfect solution for your real estate needs should feel nothing like "business as usual." Our goal is not only to provide a welcome alternative to the typical commercial real estate firm, but also to work as a committed partner for community-minded organizations.

When you work with us, your interests will be protected with the help of our comprehensive consulting, property planning and real estate services. You can feel confident that we'll research all your options, offer expert advice and work as closely with you to guide you through your options. We help to mitigate and manage risk throughout the process. Our ultimate goal is to assist you in transforming your real estate into resources.

In addition, DCG is committed to our employees and team and provides professional education and training budgets to each of our team members to ensure ongoing advancement.

FINANCIAL RESOURCES & INSURANCE

Our team is made up of full-service consulting, property planning and commercial real estate professionals. Given our robust background in commercial real estate, understanding of the California Education Code and experience in consulting and brokerage services, DCG's permanent staff and capacity to assemble the right team of subconsultants (if necessary) at the right stage creates a uniquely efficient partner for Alum Rock Union School District.

DCG has provided consulting services for education institutions for the past 17 years. Given this, we have a strong history of profitability and financial stability. DCG has consistently increased its revenue and profitability year over year. DCG is financially stable and is able to remain in business for the duration of any client contract and beyond. DCG certifies that the above information regarding our financial resources is correct.

DCG Strategies maintains insurance required to protect the District from any claims, suits, actions, costs, damages, or expenses arising from any negligent or intentional act or omission of DCG or its agents while performing services for the District. Should DCG be hired by the District, DCG will provide proof of insurance coverage, and such coverage shall be maintained in full force and effect during the term of the agreement. DCG's current insurance levels are as follows:

- Commercial General Liability: $2,000,000 per occurrence and $4,000,000 aggregate.
- Automobile Liability: $1,000,000 each accident for owned, hired and borrowed and non-owned motor vehicles.
- Professional Errors and Omissions Insurance: $1,000,000 per occurrence or claim, $1,000,000 aggregate.

- Worker's Compensation and Employer's Liability: per statute at $1,000,000.

LEGAL CLAIMS

DCG Strategies, Inc. has not had any claims filed against the firm in the past five years.

PRIOR RELEVANT EXPERIENCE

DCG has assisted a number of public school districts throughout the years. On the following pages, we are highlighting similar work to that which is needed by Alum Rock Union School District and was completed within the past five years. While DCG has worked with more than five public school districts and community colleges within the past five years, the response is limited to the five most recent districts per instruction of the RFQ/RFP. Each of the five districts below are active projects/agreements.

SAN RAFAEL CITY SCHOOLS

Primary Contact: Daniel Zaich, Senior Director – Capital Improvements, Sustainability and Construction
Phone: (415) 492-3285
Services Provided: Land use analysis, workforce housing feasibility study

Following a thorough RFP and vetting process, DCG was hired by San Rafael City Schools in May 2021 to provide asset management services for underutilized District sites. As a part of our contract, DCG completed a land use analysis on five sites identified by the District, in an attempt to determine the highest and best use of each asset, and to also further District priorities. DCG completed this analysis and was re-engaged by the District in November 2022 to explore the development of workforce housing on one previously examined site. DCG is currently completing this workforce housing feasibility study for the District.

Key DCG team members on this project include Landis Graden who serves as Policy Advisor and client main contact and Lauren Jennings who serves as the project manager overseeing the project.

RINCON VALLEY UNION SCHOOL DISTRICT

Primary Contact: Tracy Smith, Superintendent
Phone: (707) 542-7375
Services Provided: Land use analysis

DCG was hired by Rincon Valley Union School District in September 2022 to complete an alternative use analysis on a vacant, district owned site. DCG is currently finalizing our analysis and is scheduled to present our findings to the board in a public study session on January 30, 2023.

Key DCG team members on this project include Lauren Jennings who serves as the project manager overseeing the project and Carl Morabito who completed the development feasibility analysis.

BURLINGAME SCHOOL DISTRICT

Primary Contact: Tim Ryan, Facilities and Bond Coordinator
Phone: (650) 259-3816
Services Provided: Land use analysis, workforce housing feasibility study

Following a thorough RFP and vetting process, DCG was hired by Burlingame School District in December 2021 to complete an employee housing feasibility study on three district owned properties. DCG completed the analysis is two phases, similar to the phases being proposed for Alum Rock Union School District.

DCG's analysis determined two of the three sites were preliminarily feasible for development. DCG was engaged for further analysis in October 2022 which we are currently completing.

Key DCG team members on this project include Lauren Jennings who serves as the project manager overseeing the project, Landis Graden who serves as Policy Advisor, Carl Morabito who completed the development feasibility analysis and Cort Gross who completed the financial analysis.

AZUSA UNIFIED SCHOOL DISTRICT

Primary Contact: Arturo Ortega, Superintendent
Phone: (626) 858-6152
Services Provided: Land use analysis, development feasibility analysis

Following a thorough RFP and vetting process, DCG was hired by Azusa Unified School District in September 2022 as the District's development consultant to complete development feasibility on six former school sites. DCG is also contracted to provide consulting services to the District throughout their 7-11 Committee process and serve as broker for the sale/lease of sites, should the Board decide. DCG is currently completing our analysis.

Key DCG team members on this project include Lauren Jennings who serves as the project manager overseeing the project and Carl Morabito who is the lead on the development feasibility analysis.

SAN MATEO UNION HIGH SCHOOL DISTRICT

Primary Contact: Yancy Hawkins, Associate Superintendent, Chief Business Officer
Phone: (650) 558-2201
Services Provided: Development due diligence, brokerage (sale of surplus site), workforce housing analysis

Following a thorough RFP and vetting process, DCG was hired by the San Mateo Union High School District in October 2019 to represent the District on the sale of 40+ acre, former school site in San Bruno. Prior to advertising the property for sale on the open market, DCG recommended the District complete internal due diligence on the site to ensure the District was fully aware of all opportunities and constraints of the site and arm the District with strong negotiating power. As such, DCG completed development due diligence on the site.

In March 2020, DCG initiated a two-phased Statement of Qualification and Request for Proposal process to market the site to the general public. In the first phase, Statements of Qualifications were due at the end of April 2020 for those firms to qualify to submit a formal proposal on the site. The next phase included the District receiving full purchase proposals from qualified developers and ultimately selecting a final buyer for the site. The District selected a buyer in October 2020 and approved a Purchase and Sale Agreement early 2021. The property is currently in escrow scheduled to close late 2023.

The District's purpose for the sale of this asset is to provide funding for employee housing. DCG subsequently was hired in July 2021 to assist the District with the feasibility of purchasing and/or developing

units for employee housing. Key project team members include Landis Graden as the project manager and Carl Morabito as project support.

ADDITIONAL DATA

ADDITIONAL K-12 SCHOOL DISTRICT EXPERIENCE

In addition, below is a partial list of districts DCG has assisted over the past 5 years (limited to one page due to spacing). For most of the districts, DCG is assisting with multiple sites/projects.

LA MESA-SPRING VALLEY SCHOOLS

- **Services:** Land use analysis for one district owned site
- **Project Dates:** current

NORTH MONTEREY COUNTY UNIFIED SCHOOL DISTRICT

- **Services:** brokerage services for three district owned sites
- **Project Dates:** current

VALLEJO CITY UNIFIED SCHOOL DISTRICT

- **Services:** brokerage services for two district owned sites
- **Project Dates:** current

MILPITAS UNIFIED SCHOOL DISTRICT

- **Services:** Workforce housing feasibility services and brokerage (lease) services for one district owned site
- **Project Dates:** current

HAYWARD UNIFIED SCHOOL DISTRICT

- **Services:** Land use analysis and brokerage services for multiple district owned sites
- **Project Dates:** current

OAKLAND UNIFIED SCHOOL DISTRICT

- **Services:** Land use analysis, brokerage services and strategic asset management services for multiple district owned sites
- **Project Dates:** current

CHABOT LAS-POSITIAS COMMUNITY COLLEGE DISTRICT

- **Services:** Brokerage and asset management services for multiple sites
- **Project Dates:** current

POMONA UNIFIED SCHOOL DISTRICT

- **Services:** Land use analysis and brokerage services for three district owned sites
- **Project Dates:** 2022

ACALANES UNION HIGH SCHOOL DISTRICT

- **Services:** Land use analysis and brokerage services for one district owned site
- **Project Dates:** 2021

ALAMEDA COUNTY OFFICE OF EDUCATION

- **Services:** Brokerage services for one owned site
- **Project Dates:** 2021

FIRM'S CURRENT WORK COMMITMENTS

MANAGEMENT OF WORKLOAD

Based out of our Dublin, CA headquarters located in the Dublin Professional Center, we currently have over 30 active clients with the current capacity to, at minimum, double our current client load. Of the 40 clients, 12 are public school districts, some of which we are assisting with multiple, simultaneous projects.

Our firm takes a team approach to each project and, as such, are able to bring the best minds of brokerage, development and consulting to each of our projects. With our team approach and the help of online project management tools, we are able to meet deadlines efficiently and effectively. Our team meets on a weekly basis for project management meetings to ensure no tasks fall through the cracks and we are meeting established deadlines.

DCG has operational systems in place that allow us to manage a continual increase in clients and projects. We increase our staff as needed, and are confident that the current workload and availability of staff will accommodate the needs of Alum Rock Union School District. Our standard turnaround time is entirely dependent on the nature of services provided and DCG is committed to establishing timelines and expectations at the beginning of each project, and regularly provides continual updates to our clients.

FEE PROPOSAL

Our philosophy is that prior to project initiation, we meet with each client to discuss their needs and together draft an agreed upon Scope of Services, since as in most cases, the scope can change as needs evolve. Based on the final agreed upon Scope of Service, our team creates a schedule, budget and flat fee or not-to-exceed fee to be reviewed and approved by the District.

Per the request of the RFQ/RFP, below is a proposed fee for performance of the services outlined in the RFQ/RFP and DCG's prior experience in providing these services for school districts. While the final fee will be dependent on the final number of sites to be studied, the District's timeline and final scope of work, an outline of each section and corresponding estimated cost is provided.

Our standard is to provide consulting services at a flat fee prior to project initiation so the District is aware of all costs up front. For certain consulting services, our team is happy to provide consulting at the following team member rates as defined below.

The District shall be responsible for the cost of all third-party expenses, subject to prior District authorization. The District shall reimburse DCG for all consultant expenses including printing of materials and meeting supplies as specifically requested by the District. Request of reimbursement shall be made with proof of receipt and payable within 30 days of reimbursement request. DCG's consulting and brokerage fees include travel and travel will not be billed or requested for reimbursement.

TEAM MEMBER HOURLY RATES – CONSULTING SERVICES

Landis Graden, Chief Executive Officer & Principal: $350 per hour
Lauren Jennings, Vice President, Operations: $275 per hour
Carl Morabito, Vice President, Real Estate Development Services: $300 per hour
Megan McIver, Strategic Advisor, Real Estate Strategy: $250 per hour
Cort Gross, Affordable Housing & Financial Consulting Services: $300 per hour
Rachael Moy, Project Coordinator: $150 per hour

Hourly rates are invoiced at each 1/10 of an hour increment. Our standard invoicing arrangement for hourly consulting services is to invoice monthly, via email, within 10 days of the prior ending month. Invoices are due within 30 days of the date the invoice was received.

SAMPLE PROJECT RATES – FLAT FEE CONSULTING SERVICES

Based upon the Scope of Services in RFQ/RFP, below is a sample flat fee proposal. Our final fee will be based upon the final agreed upon scope of work and timeline.

Service	Fee
Background Research: Review District real property sites to determine feasibility of development of potential workforce housing.	Phase I: $25,000.
Feasibility Study: The District is interested in determining the feasibility for housing the District's workforce, including logistical considerations of constructing and maintaining workforce housing, analysis of available District real property sites for the development, type and size of proposed units, estimate of overall cost.	Phase II: $20,000 to $30,000 for each site studied for employee housing. The District should anticipate an additional estimated $10,000 per site for architecture fees.
Summary of Findings: Prepare report that summarizes the overall findings, including recommendations, regarding a District-sponsored workforce housing project, and that explains the methodology, findings, considerations, and recommendations.	Included in the per site fee above.
Presentations: Present findings and recommendations to the District Board and respond to comments and questions.	Included in the per site fee above.
Firm's Recommendations: Provide detailed information regarding any additional scope of work Firm believes is relevant to performance of the Services and that may be beneficial to the District in determining the feasibility of providing workforce housing.	Included in the per site fee above.

BROKERAGE SERVICES

As a licensed real estate firm, DCG provides brokerage and disposition services on a commission basis that is based on the final purchase price and/or final gross lease revenue payable upon successful closing of a transaction or successful execution of a lease. Our commission fee is equal to 3.5% of the sales price and/or 5% of the gross lease revenue over the initial term of the lease. The full percentage amount shall be exclusively payable to DCG as the District's Broker. Should additional commissions be paid to a Cooperating Broker procuring a buyer or lessee for the property, said additional commission shall be subject to written approval of the District or shall be paid to the Cooperating Broker by the Buyer.

Should the District choose to dispose of all or some of the sites or to lease any property or a portion of a property to fund employee housing, DCG is available to manage the lease or sale of property in a manner that is consistent with Education Code requirements and sensitive to the community's concerns regarding the disposition of district-owned property. As such, the District shall engage DCG Strategies dba DCG COMMERCIAL ("Broker") as the District's exclusive agent pursuant to a separate Exclusive Right to Sell Agreement and other agency related documentation.

For a sale of property, commissions shall be paid to Broker at close of escrow. For a lease, 50% of the lease commission is due within 30 days of mutual lease execution. The remaining 50% shall be due within 30

days of rent commencement. The commission due dates for the lease are flexible and will be based upon final negotiated terms with the buyer.

FORM OF AGREEMENT

DCG has read and reviewed the form of the Agreement included as Attachment 2 of the RFQ/RFP. DCG proposes the following changes to the Form of Agreement. Requested deletions are listed with strikethrough.

11.2. With Cause by District. District may terminate this Agreement upon giving of written notice of intention to terminate for cause. Cause shall include:

11.2.1. Material violation of this Agreement by Consultant; or

11.2.2. Any act by Consultant exposing the District to liability to others for personal injury or property damage.

Written notice by District shall contain the reasons for such intention to terminate and unless within three (3) calendar days after that notice the condition or violation shall cease, or satisfactory arrangements for the correction thereof be made, this Agreement shall upon the expiration of the three (3) calendar days cease and terminate. In the event of this termination, the District may secure the required services from another Consultant. ~~If the expense, fees, and/or costs to the District exceed the cost of providing the service pursuant to this Agreement, Consultant shall immediately pay the excess expense, fees, and/or costs to the District upon the receipt of the District's notice of these expense, fees, and/or costs.~~ The foregoing provisions are in addition to and not a limitation of any other rights or remedies available to District.

ALUM ROCK
UNION ELEMENTARY SCHOOL DISTRICT

2930 Gay Avenue, San José, CA 95127 · Phone: 408-928-6800 · Fax: 408-928-6416 · www.arusd.org

ADDENDUM 1 FOR
RFQ/RFP No. 2223-Bonds25

Development of Feasibility Study Regarding Workforce Housing

SEE CHANGES TO RFQ SCHEDULE:

Listed below is the "Tentative Timeline" which outlines pertinent dates of which firms responding to this solicitation should make themselves aware. See date change to **"Responses to Questions/Clarifications"**.

The District reserves the right to change the dates on the schedule without prior notice.

1.4. RFQ Schedule. District reserves the right to extend schedule dates by written addenda.

EVENT	TIME, DATE
Deadline for Written Questions Regarding RFQ/RFP	**4:00 P.M., Tuesday, January 10, 2023**
Deadline District's Response to Written Questions Timely Submitted. **Responses Posted on District website via Addenda.**	~~**4:00 P.M., Thursday, January 12, 2023**~~ **New Date: Friday, January 13, 2023**
Proposals Due	~~**4:00 P.M., Tuesday, January 17, 2023**~~ **New Date: Wednesday, January 18, 2023**
Interviews	**TBD – Selected firms will be contacted with a date**
Selection of Firm	**TBD**

Please submit a signed copy of this addendum with your RFQ/P response.

Company Name: DCG Strategies, Inc.

Signature: _____

Hilaria Bauer, Ph.D., Superintendent

Board of Trustees: Minh Pham, President · Corina Herrera-Loera, Vice-President
Andrés Quintero, Clerk · Ernesto Bejarano, Member · Linda Chavez, Member

Print Name: Landis Graden Date: 1/18/2023

Board of Trustees: Minh Pham, President · Corina Herrera-Loera, Vice-President
Andrés Quintero, Clerk · Ernesto Bejarano, Member · Linda Chavez, Member

ALUM ROCK
UNION ELEMENTARY SCHOOL DISTRICT
2930 Gay Avenue, San José, CA 95127 · Phone: 408-928-6800 · Fax: 408-928-6416 · www.arusd.org

ADDENDUM #2 FOR
RFQ/RFP No. 2223-Bonds25

Development of Feasibility Study Regarding Workforce Housing

Below are responses to questions presented in reference to the above RFQ/RFP.

Q & A

Q: Will the successful proposer be precluded from participating in any follow-on work for the Workforce Housing Project?

A: No.

Q: Has the District identified the potential real property sites from all existing District properties? If so, which sites have been identified?

A: No.

Q: If awarded the feasibility studies, would we be precluded from future housing work for Alum Rock Union School District?

A: No.

Q: Section 2.5.4.1. indicates K-12 and community college districts. Can we include Higher Ed relevant housing projects?

A: Please exclude Higher Ed.

Q. How is this project being funded and financed to maintain affordability?

A: GO Bonds.

Q. Does the District have current topographic and underground utility survey information available for each real property site?

A: No.

Q. Given that a hard copy is required and time is needed to print, and would it be possible to have additional time between RFI answers on the 12th and the RFQ due date of the 15th?

A: See updated timelines on the District's website.

Hilaria Bauer, Ph.D., Superintendent

Board of Trustees: Minh Pham, President · Corina Herrera-Loera, Vice-President
Andrés Quintero, Clerk · Ernesto Bejarano, Member · Linda Chavez, Member

Q. Is the District considering adaptive reuse of existing properties for housing use?

A: ***The District is open to this idea.***

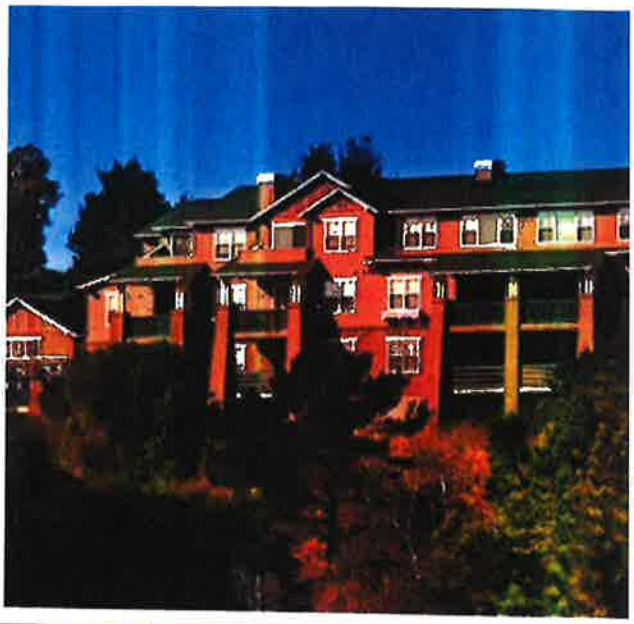
Please submit a signed copy of this addendum with your RFQ/P response.

Company Name: DCG Strategies, Inc.

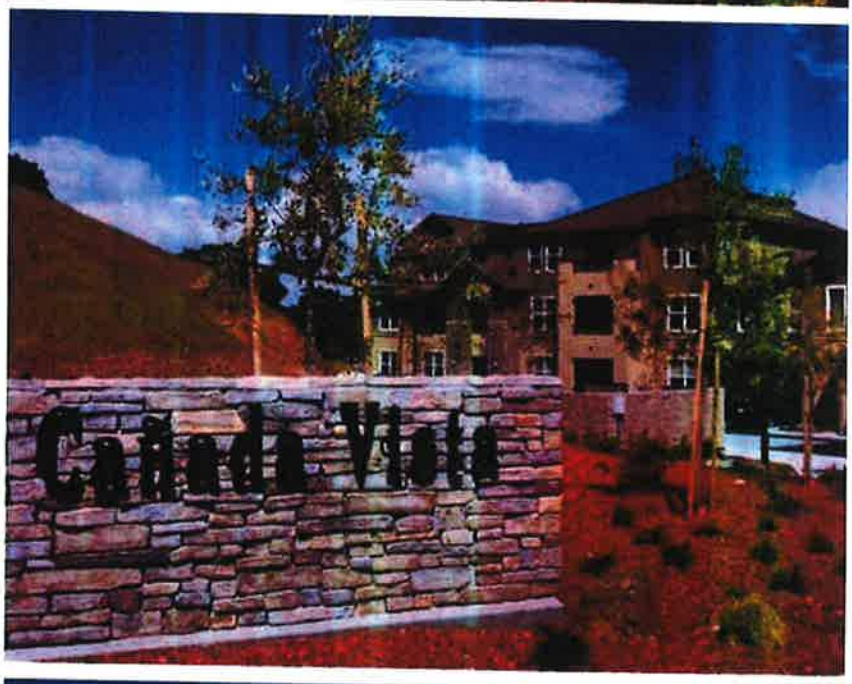
Signature: 

Print Name: Landis Graden Date: 1/18/2023









EDUCATION HOUSING PARTNERS
A THOMPSON | DORFMAN COMPANY

RFQ/RFP No. 2223-Bonds25: Workforce Housing Feasibility Study

January 18, 2023





EDUCATION HOUSING PARTNERS
A THOMPSON | DORFMAN COMPANY

January 18, 2023

Mr. Kolvira Chheng, Assistant Superintendent
Alum Rock Union Elementary School District
2930 Gay Avenue, San Jose, CA 95127

Re: Proposal for Feasibility Study for Workforce Housing

Dear Mr. Chheng,

Education Housing Partners, Inc., a California non-profit public benefit corporation (EHP), is pleased to present our qualifications and proposal for your consideration in selecting a consultant for preparing a feasibility study for workforce housing. As discussed below, we have worked with numerous school districts to create faculty housing over the years and are delighted by the success of these communities. We look forward to discussing our qualifications and experience with you in more detail as well as responding to any questions you may have.

EHP is uniquely qualified to evaluate sites and prepare a feasibility study for the Alum Rock Union Elementary School District. What makes our firm distinctive and a good fit for this assignment, as well as what separates us from other consultants, is that first and foremost, we are experienced developers of market-rate multi-family housing. This allows EHP to bring to all its engagements a level of analysis, discipline, and expertise provided only by firms with a long history of building housing.

By way of background, my partner Will Thompson and I are 35+ year veterans in housing with a reputation for quality and a track record of performance. Collectively, we have developed over 17,000 multi-family homes in 75 apartment and condominium communities. We have also been among the most active developers of multi-family housing in Northern California during the past decade.

Our related company, Thompson | Dorfman Partners, LLC (TDP), is a real estate development and investment firm that has been a leader in California's apartment industry. Since the company was formed in 1999, its exclusive focus has been on multi-family residential development, with particular emphasis on well-sited, urban infill and mixed-use properties located in high growth markets in California. While recognizing overlooked opportunities and resolving challenging development issues, TDP continues to deliver infill housing that satisfies its residents and benefits the surrounding community. Further, we have experience in Silicon Valley and managed the planning and development of both the 2,700-unit North Park and the 1,600-unit River View neighborhoods in San Jose, which set the standard for excellence in the market.

The quality of our public education system is particularly important to us. First, we believe that California's economy and future growth is dependent upon the quality of our public institutions. This is an underpinning of the housing industry. Second, we have a vested interest in seeing the quality of education improved as we have had children in public schools and family in the teaching profession. The principals of our company truly believe that to the extent school districts can provide more and better benefits to their staff, more highly qualified people will pursue this profession, and the level of instruction provided to our children will improve. We want to be part of this solution.

To this end, we formed Education Housing Partners in 2004 to provide our market-rate development services to public school districts and other public agencies on a non-profit basis in order to promote the creation of high-quality, publicly owned housing communities for teachers, staff, and other public sector employees.

EHP provided development services to:

- The Santa Clara Unified School District for both phases of its 70-unit *Casa del Maestro* teacher housing community.

- The San Mateo Community College District (SMCCD) for the 44-unit *College Vista* community and the 60-unit *Cañada Vista* community. Additionally, EHP was engaged by SMCCD to provide predevelopment services for the 28-unit *Skyline Vista* project, as well as an adjacent parcel of single-family land.

- The San Jose Unified School District to analyze the feasibility of building nearly 700 residential units on four sites within the district.

- The State of California to develop the 135-unit *Oak Hill* project in conjunction with the Marin County Office of Education.

As further described in this proposal, EHP has also been engaged by 15 other California educational agencies to analyze the feasibility of staff housing. Many of these projects for which we completed feasibility reports are currently being entitled (Soledad Unified School District), are under construction (Jefferson Elementary School District) or were recently completed (Jefferson Union High School District).

In a consulting role, EHP offers a complete scope of development services that can be specifically tailored by a school district for an individual project. These services include preliminary feasibility and financial analysis; demand surveys of staff; preparation of due diligence; selection and contracting of the design team; programming of amenities, unit mix, and design; coordination of concept, entitlement and permitting processes; budgeting of construction and soft costs; selection and negotiation of the construction general contract; construction management and coordination of turnover and warranty work; and operation and asset management.

These workforce housing communities that have been completed have proven vital for the sponsoring districts, helping to recruit and retain staff as well as serving as award-winning models for workforce housing. We are particularly proud of these developments. *Casa del Maestro, College Vista* and *Cañada Vista* have received numerous awards for concept, design and financing. They are the first publicly-owned teacher housing developments in California and have served as prototypes for public agencies across the U.S. Moreover, we look at *Casa del Maestro* and other teacher/staff housing developments as opportunities for us to give back to the community.

Please feel free to contact me with any comments or questions. We look forward to working with you.

Sincerely,



Bruce Dorfman
Chief Executive Officer
Education Housing Partners, Inc.
39 Forrest Street, Suite 202, Mill Valley, CA 94941
415.823.3001 (cell) | 415.381.3001 (office) | 415.381.3003 (fax)
bd@thompsondorfman.com | www.thompsondorfman.com

TABLE OF CONTENTS

Tab 1 - Letter of Interest

Tab 2 - Table of Contents

Tab 3 - Executive Summary

Tab 4 - Proposed Personnel

Tab 5 - Narrative

Statement of Services

Proposed Schedule of Services

Firm Information

History

Philosophy

Financial Resources and Insurance

Claims

Prior Relevant Experience

Tab 6 - Additional Data

Case Study: Oak Hill Apartments

Case Study: San Jose Unified School District

Case Study: Casa del Maestro

Case Study: College Vista

Tab 7 - Firm's Current Work Commitments

Tab 8 - Compensation

Fee Information

Tab 9 - Comments to Form of Agreement

Tab 10 - Signed Addendums to RFQ/RFP No. 2223-Bonds25

EXECUTIVE SUMMARY

Education Housing Partners, Inc. (EHP), is a leader in providing development advisory services to public school districts and other public agencies to build workforce housing for their faculty and staffs, which has proven to be valuable for employee recruitment and retainage.

- EHP was formed by the principals of Thompson | Dorfman Partners, LLC, one of the most accomplished multi-family developers in California responsible for the construction of over 17,000 units in 75 projects in the past 35 years.
- EHP provides TDP's development expertise, knowledge, and discipline to public institutions on a nonprofit basis and takes no equity ownership in the housing projects.
- EHP was established in 2004 and incorporated as a California nonprofit public benefit corporation in 2008. Its principals provided full development services for the construction of Casa del Maestro on behalf of Santa Clara Unified School District and College Vista for the San Mateo Community College District.
- EHP has provided development services on dozens of public sites ranging from feasibility analysis to construction management and asset management services.

EHP's team takes the same approach analyzing a housing site for each public agency as they do for their market-rate projects. This separates us from other consultants who have never entitled, permitted, bid, built, or operated apartment communities. We treat our school district clients as "partners" in developing workforce housing. Our objective is to be very efficient and economical with the District's resources in determining which property or properties are most appropriate for workforce housing. The Feasibility Study that will be completed is effectively a development manual that the District can implement with a high level of confidence in terms of process, schedule, budget, design, economics, and market acceptance.

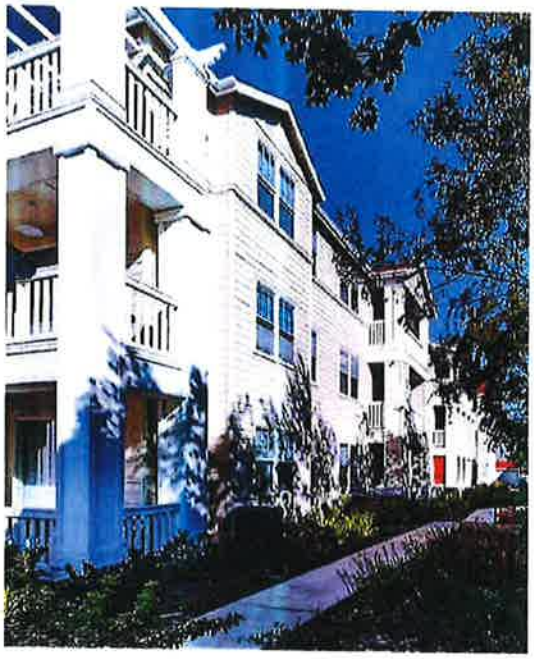
With regard to the District's objectives to build workforce housing, we would apply the following process:

1. EHP will meet with the District to better understand its objectives in terms of scale of the project, intended residents, and how the District intends to capitalize the development.
2. We will review with the District the locations, site plans, and operations of its various properties to determine which are best suited for workforce housing.
3. EHP will visit the identified sites, perform preliminary due diligence, and recommend a site or sites for detailed analysis and completion of a Feasibility Study.
4. Upon the District's approval of our recommendations, we will complete physical, political, and economic due diligence (including design) and prepare a Feasibility Study for each recommended site.

From its decades of evaluating, designing, entitling, and building multi-family projects throughout the Bay Area, EHP has relationships with the top consultants that are necessary for the planning and preparation of the Feasibility Study. Two firms that we would recommend having a major role in this process include SVA Architects (https://sva-architects.com/) and BKF Engineers (https://www.bkf.com/) – both firms have a long history in designing and evaluating housing sites in Silicon Valley. To the extent that there are other firms with which the District has worked and recommends, we would welcome their involvement as we select a full consultant team.

The principals of Thompson | Dorfman Partners created EHP as an opportunity to give back to the community. We and our employees look at our public school districts and public institutions as the foundation of the quality of life from which we all benefit in California. Because of this fundamental commitment, Alum Rock Union Elementary School District will find that EHP is collaborative, professional, engaged and a very good partner with which to undertake workforce housing.







PROPOSED PERSONNEL

Bruce Dorfman
Managing Partner
Bruce Dorfman co-founded Thompson | Dorfman Partners, LLC (TDP), a Mill Valley, California-based developer of urban multi-family projects in 1999. He manages the firm's development and financing activities. He is also a co-founder of Education Housing Partners, Inc. (EHP), a California non-profit, public-benefit corporation that focuses exclusively on the development of workforce housing for public school districts and public agencies. EHP has been at the forefront of building workforce housing since being selected by the Santa Clara Unified School District in 2000 as the design/build developer of the award-winning Casa del Maestro community.

From 2015 through 2019, Mr. Dorfman also served as Senior Managing Director of the Northern California Division of Trammell Crow Residential (TCR). He co-managed development efforts on over $1 billion of multi-family, mixed-use developments in core Bay Area locations. From 1996 until 1999, Mr. Dorfman was a Senior Vice President with Irvine Apartment Communities, where he directed site acquisition and development activities for the apartment REIT's California Division, creating a portfolio of 5,000 apartment homes in San Diego, West Los Angeles and Silicon Valley. Previously, Mr. Dorfman was with Piedmont Realty Advisors, a pension fund and institutional advisor, and also worked for Wells Fargo Bank and Bechtel Power Corporation.

Education
University of Michigan, College of Engineering, BS
University of California, Los Angeles, MBA

Professional Affiliations
Urban Land Institute - Full Member; ULI Multifamily Housing Council - Member; Lambda Alpha International - Member

William W. Thompson
Managing Partner
Will Thompson co-founded both TDP and EHP. Mr. Thompson leads the implementation of corporate strategies as well as the firm's development activities. From 2015 through 2019, Mr. Thompson also served as Senior Managing Director of the Northern California Division of TCR. He co-managed development efforts on over $1 billion of multi-family, mixed-use developments in core Bay Area locations. Mr. Thompson was also with TCR from 1984 through 1995 serving as Northern California Division Partner. During his tenure with TCR, he developed over 4,500 units in 20 projects located in the Sacramento and Bay Area markets.

Mr. Thompson was Executive Vice President of Irvine Apartment Communities from 1997 through 1999, directing all activities of the apartment REIT's California Division and creating a $1+ billion development pipeline in San Diego, West Los Angeles and Silicon Valley. Previously, Mr. Thompson was with Regis Homes Company, a Southern California-based apartment investment and development firm. As Executive Vice President of Regis, he was responsible for Northern California development activities and apartment investments in four western states. He has also held management positions with Citicorp Real Estate and James W. Rouse Company.

Education
Claremont McKenna College, BA
U.S. Coast Guard, Lieutenant

Harvard Business School, MBA

Professional Affiliations

Urban Land Institute - Associate Member; Lambda Alpha International - Member; NatureBridge Yosemite - Director

Joanna Julian

Senior Program Director

Joanna Julian is a Senior Program Director with TDP and EHP, where she is responsible for managing entitlements and project approvals, supervising and coordinating all aspects of project work, overseeing design and consultant teams, and pro forma underwriting. Ms. Julian also supports business development and financing activities. Previously, she was a Development Associate with TCR, where she managed architecture and engineering teams for ground-up multi-family developments in the Bay Area and assisted with the pursuit of new development business, market research, due diligence, and financial underwriting. Ms. Julian has also worked for Westlake Urban on several multi-family entitlement projects throughout the Bay Area. She began her career at BlackRock providing asset management for multi-family, retail, and mixed-use properties throughout the western U.S.

Education

University of California, Berkeley, BA
Yale School of the Environment, MEM

Professional Affiliations

Urban Land Institute - Associate Member

Marlon Just-Vargas

Senior Project Manager

Marlon Just-Vargas is a Senior Project Manager with TDP and EHP, where he is responsible for overseeing day-to-day project operations, managing project schedules and budgets, managing design and consultant teams, and contract administration. Previously, he was a Senior Associate/Senior Project Manager with Marx|Okubo Associates, Inc., where he represented real estate developers and investors, and provided construction project management services on commercial, residential and industrial projects in California and Nevada. He also advised clients, including institutional investors and non-profit owners, on risk control and scope of work priorities to meet budget, schedule and program requirements. Mr. Just-Vargas has also worked for SummerHill Homes on several single- and multi-family projects in the Bay Area from entitlement through land development.

Education

University of Puerto Rico, Mayagüez, BS
Stanford University, MS

Professional Affiliations

Project Management Institute - Member

Firm Availability

EHP offers ample staffing capacity with Mr. Dorfman and Ms. Julian serving as the primary contacts for the District. The project team's' in-house staff brings hands-on experience and expertise in project management, finance, design, construction, and property management.

NARRATIVE

STATEMENT OF SERVICES

EHP's proposed scope of services for preparation of the Feasibility Study for Workforce Housing is outlined as follows:

Phase I - Screen Sites for Workforce Housing:

- Meet with District to discuss District objectives, determine scope of housing program, and review District property to identify housing sites.
- Evaluate sites in terms of location, size, zoning/general plan designations, adjacent uses, and other factors necessary to support workforce housing.
- Complete preliminary physical and political due diligence on appropriate housing sites.
- Provide recommendations to District of site(s) for detailed Feasibility Analysis.

Phase II - Complete Feasibility Study for Workforce Housing for Identified Sites:

Physical and Political Due Diligence Management

- Engage physical due diligence consultants (i.e. geotechnical, civil engineer, biological, environmental firms) to complete supporting analysis.
- Review General Plan, Objective Design Guidelines, and zoning standards and meet with City staff to review approval process and identify site and/or community issues.
- Survey market comparables to determine housing alternatives and rental rates.
- Obtain title report to confirm easements and other exceptions to title.

Design Management

- Retain an architect to develop floor plans, building plans, and elevations.
- Develop a housing program including product types, unit mix, unit types, general outline of specifications, and amenities for targeted resident demographics.
- Prepare conceptual site and infrastructure plans and identify any utility limitations.
- Create and evaluate multiple development scenarios for the identified site(s).

Economic Analysis

- Engage general contractors to price conceptual design package and determine schedule.
- Solicit full-scope A&E budgets.
- Advise on value engineering considerations.
- Determine utility connection and other municipal fees.
- Prepare operating expense and reserve budget.
- Outline predevelopment and construction schedules and budgets.
- Generate financial analysis for the proposed project.

Entitlements

- Develop entitlement strategy and schedule.

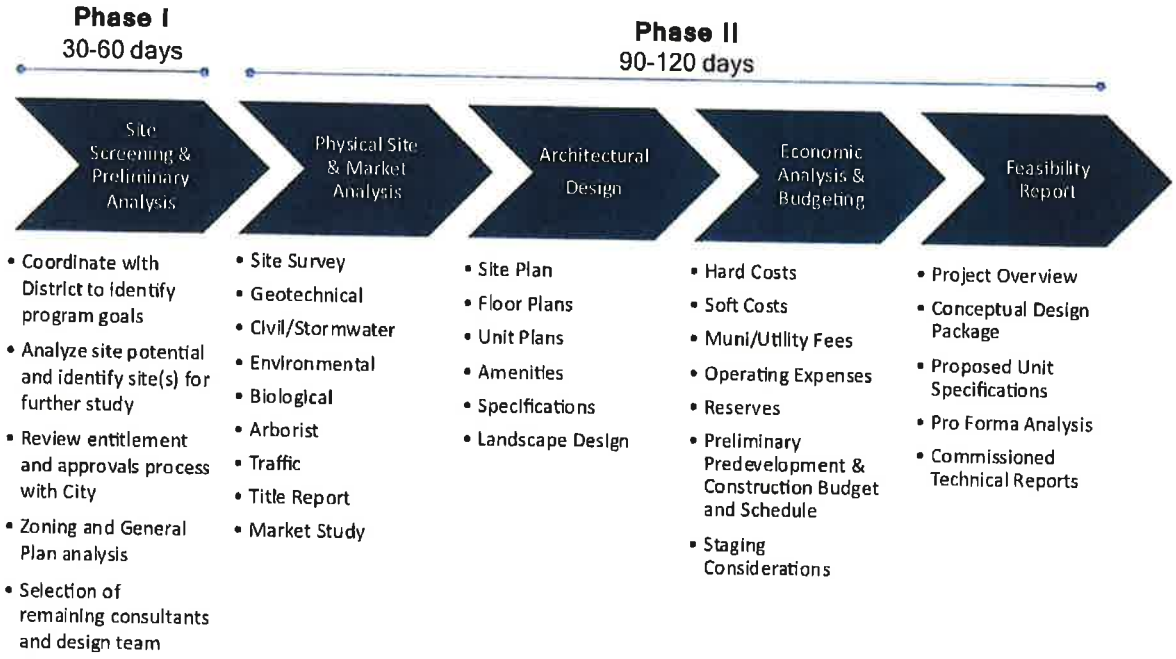
- Identify required elements for CEQA compliance.
- Outline subsequent steps and outstanding items required for project approval.
- Coordinate pre-application package.
- Attend a District meeting to present plans and explain feasibility studies and process.

Administrative

- Interview, recommend and contract with a design team and any other consultants.
- Review and approve all requests for payment by the consultant team.
- Process accounting and progress billings (at the direction of the District).

Other

- Initiate community outreach with neighborhood residents or groups (as required).
- Provide monthly overall update reports.



PROPOSED SCHEDULE OF SERVICES

As shown in the above diagram, we anticipate that the first phase will require 30 to 60 days to complete an initial analysis of District property to determine which site(s) best meet the objectives of the housing program, including scope and program (number and types of units). Once this is completed, and at the direction of the District, we typically require 90 to 120 days to prepare an in-depth evaluation of the physical, economic, and political constraints involved with developing the proposed project (the Feasibility Study). Working in concert with your staff, we will then provide you with a detailed program, predevelopment and development budget, schedule, conceptual design alternatives, and project economics that meet the District's objectives while providing a high likelihood of the City of San Jose's approval.

FIRM INFORMATION

History

EHP is a California nonprofit public benefit corporation that was established in 2004 by Will Thompson and Bruce Dorfman, the principals of Thompson | Dorfman Partners, LLC, and incorporated in 2008. It exclusively provides residential development advisory and consulting services to public agencies, primarily involved with providing housing to assist in recruiting and retaining faculty and staff. EHP's engagements with public school districts go back to 2000 when it was retained by Santa Clara Unified School District for the feasibility analysis, entitlement, permitting, and construction management of Casa del Maestro.

Philosophy

EHP works very collaboratively and tailors its approach and program to respond to the District's organizational requirements and needs. Typically, after an initial kick-off meeting in which roles and scope are further detailed, EHP has bi-weekly meetings with District staff and monthly meetings with any committees that have been formed to oversee our activities. There is generally a point person at the District that can help facilitate our informational requests between formal meetings. However, EHP has the absolute flexibility to modify this schedule to meet the requirements of the District.

EHP has been established to bring its market-rate development expertise to the public creation of workforce housing on a non-profit basis, specifically to assist school districts and other public agencies. As longtime veterans of the housing industry, the principals of EHP see the need to invest in our public institutions to maintain California's high quality of life for all and sustain our economy. The company takes no ownership in these projects, there is no profit motive, and EHP looks at these engagements as an opportunity to give back to the community.

Financial Resources and Insurance

EHP has commercial general liability insurance of $2,000,000 per occurrence and $3,000,000 in aggregate, plus a $1,000,000 excess liability umbrella. In addition, EHP carries a $1,000,000 professional (errors and omissions) liability insurance policy.

EHP has significant financial resources and further can rely on those of TDP as required. For specific questions regarding financial health and history, we refer you to our lead banker:

Jeff Winkel, Senior Managing Director
First Republic Bank
(415) 262-4126
jwinkel@firstrepublic.com

Claims

For the previous five years, let alone in their history, neither EHP nor TDP has had any claims, defaults, judgments, court orders, pending litigation, or other matters reflecting a violation of applicable laws related to the operations or projects undertaken by the respondent or any of its individual members or affiliates that exercise direct or indirect control over these entities, including all key persons on the team identified herein.

Letters of Reference/Testimonials

Please see the attached letters of recommendation by:

- Senator Mike McGuire, Majority Leader
- Marin County Office of Education
- San Jose Unified School District
- Soledad Unified School District
- Sonoma County Office of Education







California State Senate

SENATOR MIKE MCGUIRE

MAJORITY LEADER

NORTHERN CALIFORNIA'S SECOND SENATE DISTRICT

January 17, 2023

Mr. Kolvira Chheng
Assistant Superintendent
Alum Rock Union Elementary School District
2930 Gay Avenue
San Jose, CA 95127

Dear Mr. Chheng:

I am writing in support of Education Housing Partners (EHP). They have been a leader in working with public school districts throughout California since working with the Santa Clara Unified School District in 2002.

In January 2021, Education Housing Partners organized a team that was selected by the State of California to develop workforce and affordable housing on a surplus site in Marin County, which is in my senatorial district. EHP's project will create 135 units of rental housing affordable to residents with incomes of 50% to 120% of AMI. This pioneering approach promises to be a model that addresses California's housing crisis by creating housing for the "missing middle".

EHP has been well-prepared in addressing several complex site, community, and governmental issues. They have also worked collaboratively with State and local agencies which was required to form a Joint Powers Authority and properly apply Fair Housing legislation.

Thank you for your consideration of Education Housing Partners. If our office can be of any assistance, please do not hesitate to call us at 916-651-4002.

Warmest Regards,

Mike McGuire
State Senator

MARIN COUNTY
OFFICE OF EDUCATION

1111 LAS GALLINAS AVENUE
P.O. BOX 4925
SAN RAFAEL, CA 94913-4925

JOHN A. CARROLL
MARIN COUNTY
SUPERINTENDENT OF SCHOOLS

(415) 472-4110
FAX (415) 491-6625
marincoe@marinschools.org

January 11, 2023

Mr. Kolvira Chheng
Assistant Superintendent of Business Services
Alum Rock Union School District
2930 Gay Avenue
San Jose, CA 95127

Re: Letter of Support for Education Housing Partners

Dear Mr. Chheng,

On behalf of the Marin County Office of Education (MCOE), I am pleased to provide this letter of support for Education Housing Partners' (EHP's) qualifications to provide workforce housing feasibility services to Alum Rock Union School District.

MCOE has been working with EHP for the past two years to develop 135 units of housing for income-qualifying teachers, school staff and County employees on approximately 8.5 acres of excess state property in the unincorporated area of San Quentin. EHP has been skillfully leading the project through design, CEQA review, and community outreach. Given the exorbitant housing costs in the County, being able to provide high-quality and affordable apartments will help our districts recruit and retain employees in Marin.

Our working relationship with EHP has been positive in every way. The EHP team knows the importance of open and transparent communication with its partners and with the community. The building of affordable housing can be challenging for a community and EHP's approach to the process has kept our community well-informed with clear, consistent, and relevant information. This has been an important key to the success of the project to date.

MCOE has been pleased with EHP's thoughtfulness, knowledge of entitlement and development processes, ability to keep the project advancing, and its patience and determination when working with a number of stakeholders including local staff, elected officials, and State representatives.

EHP has a deep commitment to the development of affordable housing for educators. We have been impressed with its teacher housing developments elsewhere in the Bay Area and we are glad to have it as a partner in Marin County. We recommend it to Alum Rock Union School District without hesitation.

Please contact Ken Lippi, Senior Deputy Superintendent, if you would like additional information.

Sincerely,

John Carroll
Marin County Superintendent of Schools

San José
Unified
School District

January 13, 2023

RECOMMENDATION FOR EDUCATION HOUSING PARTNERS

Preparing
today's students
to be the
thinkers,
leaders,
and creators
of tomorrow.

Dear Kolvira Chheng,

In late 2019, as part of our employee housing initiative, San José Unified signed a Predevelopment Services Agreement with Education Housing Partners to conduct housing feasibility analyses on four of our properties. We were already working with two housing consultants at the time and needed a contractor who could coordinate with these consultants, initiate and manage any needed subcontracts for the feasibility analyses themselves, and help our community envision potential aesthetics, financials, and other considerations for each property.

Education Housing Partners did everything we needed. They were professional, asked insightful questions, and worked well with both our existing consultants and district staff. They checked in with us at key decision points and incorporated our feedback while requiring little oversight given their demonstrated understanding of our goals. Even though pandemic-induced closures occurred in the middle of their work for us, they stayed the course and provided us with their completed analysis before the end of the 2019-2020 school year.

The final Faculty/Staff Housing Assessment San José Unified received from Education Housing Partners included an overview document for anyone wishing to understand their basic findings, conclusions, and proposed next steps; civil engineering, geotechnical, traffic, environmental, title, and financial summaries for each of the four properties they analyzed; and exhibits with supporting information. My colleagues and I were impressed with the assessment's clarity, accessibility, and detail. Our Board of Education accepted the assessment on June 25, 2020.

While our Board of Education's discussion of the assessment and potential next steps has been postponed due to pandemic-related challenges, I enthusiastically share the assessment with people who inquire about our employee housing initiative. I believe the assessment will be valuable when we return to the initiative. I am glad to have had the opportunity to work with Education Housing Partners and recommend their predevelopment services highly.

Sincerely,

Ben Spielberg
Manager of Strategic Projects
bspielberg@sjusd.org
408-535-4726

sjusd.org
408-535-6000
855 Lenzen Avenue
San José, CA 95126

Soledad Unified School District

MEMBERS OF THE BOARD

Iván A. Ibarra Mora, *President*
Roberto Ocampo, *Vice-President*
Monica Pantoja, Clerk
Christopher Bourke, Trustee
Javier Galvan, Trustee

ADMINISTRATION

Mr. Randy Bangs
Superintendent

Dr. Limary T. Gutierrez
Associate Superintendent of Ed Services

January 17, 2023

To Whom It May Concern:

The Soledad Unified School District (SUSD) initially engaged Education Housing Partners to study the feasibility of building a faculty and staff housing community for our district. Their work on this project was highly professional and thorough as well as on-time and on-budget. EHP was subsequently retained to further develop the concept drawings that were prepared as part of the feasibility study and process the entitlements with the City of Soledad.

EHP's experience with multi-family housing and working with dozens of other school districts has greatly benefited SUSD on this project. They have managed the design of a high-quality apartment building that is both contextual and architecturally pleasing. Also, it will be practical to build and operate while offering a desirable living environment for our staff – this will help us recruit and retain employees, which has become an increasing challenge.

Bruce Dorfman and his team have worked very well with the District. They have taken a proactive approach in working with our district and have been very responsive in working with our staff. EHP has kept us apprised of their activities, provided us significant visibility into the development process, and succinctly provided us background information for our consideration when major decisions were required. Their focus on schedule, budget, and design quality has allowed this aspect of our housing development to move forward smoothly and with few surprises.

On behalf of the Soledad USD, I highly recommend Education Housing Partners. Their professionalism, experience, and the quality of their work product would be an asset to any educational agency interested in creating workforce housing.

Sincerely,

Randy Bangs
Superintendent

Sonoma County
Office of Education

5340 Skylane Boulevard
Santa Rosa, CA 95403-8246
(707) 524-2600 | scoe.org

January 13, 2023

Alum Rock Union School District
Kolvira Chheng
Assistant Superintendent, Business Services
2930 Gay Avenue
San Jose, CA 95127

RE: Letter of Reference for Education Housing Partners for RFQ/RFP No. 223-Bonds25 (Workforce Housing)

Dear Mr. Chheng:

It is my privilege to write a letter of reference for Education Housing Partners (EHP). The Sonoma County Office of Education (SCOE) has worked since 2021 with Bruce Dorfman, Joanna Julian and the entire EHP Team on a workforce housing feasibility and development study for SCOE. SCOE is very satisfied with the working relationship with EHP and unconditionally recommends their services.

SCOE's workforce housing diligence to-date is based around a multi-acre property adjacent to our alternative education campus in Santa Rosa. The working housing designs and financial models range from a 40-unit "pocket neighborhood" with townhouses to a 120-unit multi-story "stacked flats" complex, with various permutations and combinations in between.

Bruce, Joanna and the entire EHP Team continue to deliver high quality work product backed by deep knowledge of real estate development. Their knowledge of finance, construction, entitlements, permitting, and truly everything under the sun related to this very complex workforce housing topic is top notch. The EHP Team has deployed their complete suite of knowledge and services throughout SCOE's current project. Bruce and Joanna are excellent communicators and also excellent listeners. Their level of integrity and intellectual horsepower gives SCOE the confidence to know that the information we are presenting to the community and basing decisions on is accurate and actionable.

In summary, SCOE appreciates the professionalism and capabilities of the EHP Team. If Alum Rock Union decides to hire EHP, the district will have a knowledgeable and trusted partner to explore and develop a workforce housing project. Please do not hesitate to contact me if I can provide any additional details.

Sincerely,

Greg Medici
Deputy Superintendent, Business Services
707-637-7461 (cell)

Steven D. Herrington | Sonoma County Superintendent of Schools
Board of Education | Gina Cuclis, Herman G. Hernandez, Peter Kostas, Andrew Leonard, Lisa Wittke-Schaffner

PRIOR RELEVANT EXPERIENCE

Marin County Office of Education (2020-Present)

- **Project Site:** Oak Hill (San Quentin State Surplus Site) - Marin County, CA
- **Services Provided:** Development Advisory Services to develop 135-unit faculty/staff housing for Marin County school district employees and County of Marin employees
- **Contact:** Ken Lippi, Senior Deputy Superintendent | (415) 499-5803 | Klippi@marinschools.org
- **Personnel:** Bruce Dorfman, Will Thompson, Joanna Julian

Sonoma County Office Education (2021-Present)

- **Project Site:** Amarosa Academy - Santa Rosa, CA
- **Services Provided:** Feasibility Study to evaluate three workforce housing program options from 40-70 units for a 2.2 acre vacant parcel. EHP was subsequently re-engaged in 2022 to evaluate a newly acquired parcel expanding the site to 2.8 acres.
- **Contact:** Greg Medici, Deputy Superintendent | 707.524.2631 | gmedici@scoe.org
- **Personnel:** Bruce Dorfman, Will Thompson, Joanna Julian

Soledad Unified School District (2021-Present)

- **Project Site:** Soledad St. & Monterey St. - Soledad, CA
- **Services Provided:** Feasibility Study and Development Advisory Services to develop 20 units of workforce housing on a 0.8 acre site in Downtown Soledad.
- **Contact:** Randy Bangs, Superintendent | 831.678.2909 | rbangs@soledad.k12.ca.us
- **Personnel:** Bruce Dorfman, Will Thompson, Joanna Julian

San Jose Unified School District (2020)

- **Project Sites:** Pine Hill, River Glen, Metro Ed, and Lenzen sites - San Jose, CA
- **Services Provided:** Feasibility Study to evaluate multiple development options on four sites owned by SJUSD planning for approximately 700 units.
- **Contact:** Ben Spielberg, Manager of Strategic Projects | 408.535.4726 | bspielberg@sjusd.org
- **Personnel:** Bruce Dorfman, Will Thompson, Joanna Julian

Jefferson Elementary School District (2018)

- **Project Site:** Margaret Pauline Brown Elementary School Site - Daly City, CA
- **Services Provided:** Feasibility Study, including administration of a faculty/staff survey, to evaluate 48 units of workforce housing on approximately 4 acres.
- **Contact:** Bernardo Vidales, Superintendent | 650.991.1000 | bvidales@jeffersonesd.org
- **Personnel:** Bruce Dorfman, Will Thompson, Alexandra Daum

OAK HILL APARTMENTS: DEVELOPMENT OF FACULTY/STAFF HOUSING

District:	Marin County Office of Education
Location:	Excess state property in unincorporated Marin County near San Quentin, CA
Year Completed:	2021: Selected by the State of California following a competitive RFP process 2024 Q1: Estimated construction start; 2026 Q1: Estimated construction completion
Architect:	SVA Architects, Inc.
Landscape Architect:	RHAA Landscape Architects + Planners
Site Area:	8.3 acres
Proposed Concept:	135 units comprised of 101 units for faculty/staff of Marin County school districts and 34 units for County of Marin employees
Project Overview:	Oak Hill Apartments is proposed to be developed on approximately 8.3 acres of unused state property in the unincorporated area of San Quentin as a result of Executive Order (N-06-19) executed by Governor Gavin Newsom to identify State-owned sites to address the California housing crisis. The 100 percent affordable housing community would include the construction of two buildings containing up to 250 new units—135 apartments to be built by Education Housing Partners (EHP) for low- to moderate-income teachers and staff of local school districts and County employees, and 115 apartments developed by Eden Housing available to extremely low to low-income families. EHP has provided preliminary financial feasibility, completion of due diligence, selection of the design team, unit mix and programming recommendations, and is coordinating the design, entitlement, and permitting of the proposed community. Due to the State's ownership of the site, the State will be the lead agency on entitlements, CEQA, and permitting facilitating a streamlined review process.
Conceptual Plan and Program:	The faculty/staff and employee housing will offer one, two and three-bedroom for-rent apartment homes. The preliminary design concept responds to the environment by gently terracing homes to maximize Bay and hillside views. The community will feature sustainable design, drought-tolerant landscaping, and high-quality finishes. Amenities will include structured parking, a clubhouse with a lounge and business center, a fitness center, as well as outdoor areas for socializing, playing, and reflecting.

OAK HILL APARTMENTS

Financing Concept: EHP has developed an innovative financial structure for capitalizing the proposed development based on a model that has been used for other public purposes, but will be adapted for this teacher/staff housing community. While EHP will lead the project through predevelopment and secure entitlements, the project will be owned by a Joint Powers Authority (JPA) formed by MCOE and the County of Marin. The JPA will issue tax-exempt bonds to finance construction of the project. The project will be totally self-funding without any financial support or guarantees from the members of the JPA.

Economic Analysis: The total development budget is estimated to be $100 million. Following receipt of entitlement approvals and permitting, EHP will secure a guaranteed maximum price contract from a third-party general contractor. Once the project is constructed, initial rents will be set at the level necessary to cover operating expenses, reserves, and debt service, and are anticipated to be ~70% of market rate for a comparable product.

Public Benefits: This project allows MCOE to provide discounted housing to Marin school district employees to help recruiting and reduce attrition; secondary benefits to MCOE and the districts include residual cash flow from the project and operating expense savings due to lower hiring and training costs.

Reference: **John Carroll, Superintendent, Marin County Office of Education**
(415) 499-5801, jcarroll@marinschools.org
Ken Lippi, Senior Deputy Superintendent, Marin County Office of Education
(415) 499-5803, Klippi@marinschools.org


OAK HILL SITE PLAN


OAK HILL APARTMENTS, Marin County, CA

SAN JOSE UNIFIED SCHOOL DISTRICT
FACULTY/STAFF HOUSING FEASIBILITY STUDY

Project Name:	Business Plan Development for Faculty/Staff Housing on Four Sites
Location:	San Jose, California
Year Completed:	2020
Owner:	San Jose Unified School District
Developer:	Education Housing Partners
Architect:	KTGY Architecture + Planning
Landscape Architect:	The Guzzardo Partnership
Civil Engineer	BKF Engineers



Size/Acreage/Total Development Budget:

Bouret Site
8.68 acres
73 Stacked-Flat Units; 48 Townhome Units
Total Development Budget: $80M-$111M

Broadway Site
4.59 acres
120 Stacked-Flat Units; 32 Townhome Units
Total Development Budget: $89M-$135M

Hillsdale Site
4.0 acres
325 Stacked-Flat Units
Total Development Budget: $167M-$237M

Lenzen Site
0.57 acres
75 Stacked-Flat Units
Total Development Budget: $49M-$64M

Project Overview: Education Housing Partners was retained to develop a Business Plan for the reuse of four surplus sites owned by the San Jose Unified School District (SJUSD) to develop faculty/staff housing. On behalf of the District, EHP retained and managed a design team to perform physical due diligence on the sites, directed the design of massing studies for a variety of rental housing programs (unit mix and sizes), and provided preliminary economic analysis, project schedules and development budgets. A preferred plan for each site that met the District's objectives was chosen for detailed economic analysis. The preferred plan had to (1) be contextual with the neighborhood surrounding each subject property, (2) provide a functional replacement of open space, if it was impacted on a specific campus, (3) incorporate a mix of unit types (both within the individual projects and across the portfolio) that would accommodate the breadth of household sizes of the District's employees, and (4) be of comparable quality to competitive market-rate rental communities in Silicon Valley.

SAN JOSE UNIFIED SCHOOL DISTRICT

Conceptual Plan and Program: For each of the four preferred plans, EHP directed the development of conceptual architectural and engineering plans that detail the site planning and massing, building typology and illustrative elevations, unit program and specifications, parking, landscape and open space design, and preliminary civil engineering and evaluation of off-site improvements necessary to support the proposed project.

Several of the analyzed sites are in established single-family neighborhoods. Due to this condition, significant efforts were taken to blend the higher-density program into the existing built environment by incorporating lower density townhome product that offered a contextual elevation as well as a large floor plan unit that was desirable to a targeted cohort.

Economic Analysis: With the information outlined above, EHP analyzed project costs and economics. To assist this effort, three general contractors were engaged to prepare hard cost budget estimates for each of the sites based on a prevailing wage scale. These budgets were analyzed for completeness and consistency to determine a range of probable cost for each associated project.

The resulting hard and soft cost budgets were used to determine the revenue necessary to achieve financial stability. These revenues are referred to as the "break-even revenues," which are the revenues necessary to cover operating expenses, reserves, and debt service. In addition, EHP identified and performed a rental analysis of multifamily competitors in the submarket to contextualize the break-even revenues versus market rents.

References:

Steve Adamo
Director of Facilities and Operations
San Jose Unified School District
408.535.6000
sadamo@sjusd.org

Ben Spielberg
Public Engagement Officer
San Jose Unified School District
408.535.6000
bspielberg@sjusd.org

Stephen McMahon
Deputy Superintendent
San Jose Unified School District
408.535.6000
smcmahon@sjusd.org



BOURET SITE, San Jose Unified School District, San Jose

CASA DEL MAESTRO
DEVELOPMENT OF FACULTY/STAFF HOUSING

Project Name:	Casa del Maestro
Location:	Santa Clara, California
Size/Acreage:	70 units (40 units – Phase I; 30 units – Phase II)/3.5 acres
Use:	Faculty/Staff Housing
Approximate Cost:	$12,700,000
Date Opened:	2002 – Phase I; 2009 – Phase II
Owner:	Santa Clara Unified School District
Developer:	Education Housing Partners
Architect:	KTGY Architecture + Planning
Landscape Architect:	The Guzzardo Partnership

Project Overview: Education Housing Partners was chosen through an RFP process to provide full development services to the Santa Clara Unified School District (SCUSD) for the construction of Casa del Maestro, the first faculty housing community built for a public school district in the State of California. The first phase of this teacher housing community was developed in response to an alarming 300% rise in the attrition rate of its teachers due to the increase in local housing costs during the dot.com boom while the District was in a hiring mode to address the state-sponsored Class-Size Reduction program. EHP provided preliminary financial feasibility, completion of due diligence, selection and contracting of the design team, unit mix and programming recommendations, coordination of design, entitlement and permitting processes, budgeting of construction and soft costs, selection and negotiation of the general contract, construction management, and coordination of turnover and warranty work. Reacting to significant demand and success of the concept, in 2006 the District again selected TDP to expand Casa del Maestro. The 30-unit second phase was delivered in 2009.



CASA DEL MAESTRO

Conceptual Plan and Program: KTGY designed both Phase I and Phase II which offered one- and two-bedroom units that were similar in layout and features to those in new market-rate apartments. The site consists of two-story and three-story motor court buildings creating a green lawn commons that terminates into a single-story community building featuring a communal kitchen and a large-screen TV entertainment room with a fireplace. Phase II incorporated numerous upgrades to improve environmental sustainability to help meet LEED Silver guidelines. Casa del Maestro was built on a corner of the playfields of a surplus middle school campus.

Financing: Both Phases I and II were financed with Certificates of Participation (COPs) that the District issued and secured by the housing. The rental rates were set to cover (1) principal and interest on the COPs (the first phase was structured as interest-only), (2) operating expenses and (3) reserves. Initial rental rates were less than 60% of the market rate for comparable units.

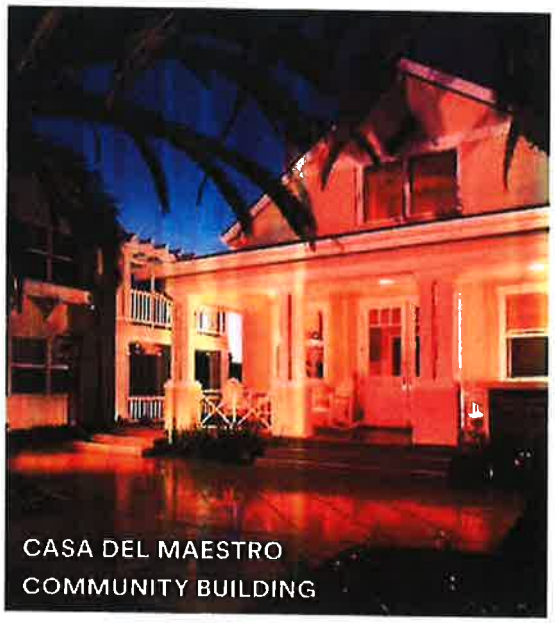
District Findings: In late 2005, SCUSD analyzed the impact of teacher housing on its employee base and determined that teachers of similar tenure who did not live in Casa del Maestro were nearly three times more likely to leave the District than those who lived in the teacher housing. Casa del Maestro continues to offer significantly below-market rental rates and delivers benefits to SCUSD which include a supportive environment where teachers can live amongst their peers. In addition, eliminating long commutes for teachers has increased opportunities for a better life balance, and community and school involvement.

Recognition: Casa del Maestro has received numerous awards for its concept, design and financing including the ULI Jack Kemp Workforce Housing Models of Excellence Award.

References:

Paul Perotti
Former Superintendent
Santa Clara Unified School District
408.889.3838
plperotti@yahoo.com

Lori Raineri
President
Government Financial Strategies
916.444.5100
lori@gfsi.com



CASA DEL MAESTRO
COMMUNITY BUILDING

COLLEGE VISTA
DEVELOPMENT OF FACULTY/STAFF HOUSING

Project Name:	College Vista
Location:	San Mateo, California
Size/Acreage:	44 units/2.25 acres
Use:	Faculty/Staff Housing
Approximate Cost:	$9,000,000
Date Opened:	2006
Owner:	San Mateo Community College District
Developer:	Education Housing Partners
Architect:	KTGY Architecture + Planning
Landscape Architect:	The Guzzardo Partnership

Project Overview: The objective of Education Housing Partners and San Mateo Community College District (SMCCD) was to develop a high-quality community with compelling architecture that fits into the College of San Mateo campus and its surrounding neighborhoods. College Vista is composed of 44 units situated in two, three-story buildings developed on a former 2.25-acre surplus parking lot on the College of San Mateo campus. Education Housing Partners was retained as the Design/Build Contractor under California Government Code 5956 and was responsible for assembling and managing the design team, entitling and permitting the property, retaining a contractor, and providing construction management and turnover services. The project is economically, socially and environmentally sustainable and is a model for public/private partnerships and smaller scale, infill residential development.

The project is owned by SMCCD and restricted to occupancy for its faculty and staff on a rental basis. Initial rents were set at the level necessary to cover operating expenses, reserves, and debt service and rental rates are estimated to be about 60% below-market for comparable quality rental housing on the Peninsula. The community is managed and operated by a third-party, nonprofit entity, the San Mateo County Colleges Educational Housing Corporation, in order to provide separation between landlord and employee.

COLLEGE VISTA

Conceptual Plan and Program: College Vista abuts an open space surrounded by private residences and the College's Administrative Building. Due to this prominent location, a craftsman influenced "lodge" was conceived to blend into its surroundings. Designed by KTGY, the community features 44 one-, two-, and three-bedroom units to serve a range of household types and lifestyles. All units incorporate spacious floor plans, decks or patios, all electric kitchen with refrigerator and microwave, attached garages (the majority of the units have direct access garages), full-size washer/dryers, 9-foot ceilings and large windows. The 1,000-square-foot community building offers residents a lounge, big-screen television area, full kitchen, and fireplace while the well-landscaped grounds offer outdoor amenity areas. College Vista is fully integrated into the College of San Mateo campus, providing a very walkable location for residents.

Financing: SMCCD provided financing through a large facilities bond that also capitalized numerous upgrades and new science and academic buildings on its three campuses.

Reference:
Barbara Christensen
Director Community/Government Relations
San Mateo Community College District
510.759.5590
christensen@smccd.edu


COLLEGE VISTA
San Mateo County Community College District, San Mateo



FIRM'S CURRENT WORK COMMITMENTS

Firm Availability

Education Housing Partners is available to dedicate the following senior personnel and time, expressed as a percentage of a Full-time Equivalent (FTE) workload, to provide the services required by this proposal:

Name	Position Title	Phase I Services (FTE)	Phase II Services (FTE)
Education Housing Partners, Inc.			
Bruce Dorfman	Managing Partner	30%	20%
Will Thompson	Managing Partner	10%	10%
Joanna Julian	Senior Program Director	25%	25%
Marlon Just-Vargas	Senior Project Manager	15%	25%

Ability to Complete the Services

Education Housing Partners offers ample staffing capacity with access to experienced professionals possessing a wide range of skills and expertise, as described in Tab 4 - Proposed Personnel. The project team's' in-house staff brings hands-on experience and expertise in project management, finance, design, construction, and property management.

For a list of current and past EHP engagements, please refer to the exhibit on the following page.

EHP Current & Past Work Engagements

Faculty/Staff Housing Feasibility Studies

*** Current engagements**

- Pasadena Unified School District *
- Sonoma County Office of Education *
- Southern Humboldt Joint Unified School District *
- Soledad Unified School District *
- City College San Francisco: Eddy Street Site
- College of Marin: Indian Valley Campus
- Jefferson Elementary School District: MP Brown Elementary School
- Jefferson Union High School District: Serramonte Site
- Pacifica School District: Oddstad Campus
- San Jose Unified School District:
    - Lenzen Site
    - Metro Ed Campus
    - Pine Hill Middle School
    - River Glen Elementary School
- San Mateo Community College District: San Bruno Campus, including SFR Surplus Land Disposition

Development Advisory Engagements

- Cal Poly Corporation *
- Marin County Office of Education *
- San Mateo Community College District
    - Cañada Vista
    - College Vista
- Santa Clara Unified School District
    - Casa del Maestro, Phase I
    - Casa del Maestro, Phase II
- Sausalito/Marin City School District: Bayside Campus

Other Engagements

- Alameda Unified School District: Alameda Point - Feasibility Study and Development Agreement
- Mill Valley School District: Forrest Street - Joint Venture
- Novato Unified School District

EDUCATION HOUSING PARTNERS
A THOMPSON | DORFMAN COMPANY

January 18, 2023

Mr. Kolvira Chheng
Assistant Superintendent
Alum Rock Union Elementary School District
2930 Gay Avenue
San Jose, CA 95127

Re: RFQ/RFP No. 2223-Bonds25
Development of Feasibility Study Regarding Workforce Housing

This proposal outlines the general terms in which Education Housing Partners, Inc. (EHP) would perform the services outlined in Exhibit A of the above referenced RFQ/RFP for Alum Rock Union Elementary School District (District). The first phase of this work would be billed on an hourly basis as outlined in Exhibit A and would include identifying a site or sites most appropriate for Workforce Housing. Once a Workforce Housing site(s) is identified, EHP would work on a fixed-price budget to prepare a feasibility assessment for the development of faculty/staff housing.

We anticipate that the first phase will require 30 to 60 days to complete an initial analysis of District property to determine which site(s) best meet the objectives of the housing program, including scope and program (number and types of units). Once this is completed, and at the direction of the District, we typically require 90 to 120 days to prepare an in-depth evaluation of the physical, economic, and political constraints involved with developing the proposed project (the Feasibility Study). Working in concert with your staff, we will then provide you with a detailed program, predevelopment and development budget, schedule, conceptual design alternatives, and project economics that meet the District's objectives while providing a high likelihood of City approval.

If the District should decide to move forward with the formal design and entitlement of a Workforce Housing site, EHP can separately contract with the District to manage this process. EHP provides management services for all phases of workforce housing development including conceptual design, entitlement, permitting, contracting, lease-up, and operations.

I have outlined below EHP's proposed scope of services for preparation of the Feasibility Study for Workforce Housing.

Phase I – Screen Sites for Workforce Housing:

- Meet with District to discuss District objectives, determine scope of housing program, and review District property to identify housing sites.
- Evaluate sites in terms of location, size, zoning/general plan designations, adjacent uses, and other factors necessary to support workforce housing.
- Complete preliminary physical and political due diligence on appropriate housing sites.
- Provide recommendations to District of site(s) for detailed Feasibility Analysis.

Phase II – Complete Feasibility Study for Workforce Housing for Identified Sites:

Physical and Political Due Diligence Management

- Engage physical due diligence consultants (i.e., geotechnical, civil engineer, biological, environmental firms) to complete supporting analysis.
- Review General Plan, Objective Design Guidelines, and zoning standards and meet with City staff to review approval process and identify site and/or community issues.
- Survey market comparables to determine housing alternatives and rental rates.
- Obtain title report to confirm easements and other exceptions to title.

Design Management

- Retain an architect to develop floor plans, building plans, and elevations.
- Develop a housing program including product types, unit mix, unit types, general outline of specifications, and amenities for targeted resident demographics.
- Prepare conceptual site and infrastructure plans and identify any utility limitations.
- Create and evaluate multiple development scenarios for the identified site(s).

Economic Analysis

- Engage general contractors to price conceptual design package and determine schedule.
- Solicit full-scope A&E budgets.
- Advise on value engineering considerations.
- Determine utility connection and other municipal fees.
- Prepare operating expense and reserve budget.
- Outline predevelopment and construction schedules and budgets.
- Generate financial analysis for the proposed project.

Entitlements

- Develop entitlement strategy and schedule.
- Identify the approval process for the City and any related agency approvals, to the extent required.
- Identify required elements for CEQA compliance.
- Outline subsequent steps and outstanding items required for project approval.
- Coordinate pre-application package.
- Attend a District meeting to present plans and explain feasibility studies and process.

Administrative

- Interview, recommend and contract with a design team and any other consultants.
- Review and approve all requests for payment by the consultant team.
- Process accounting and progress billings (at the direction of the District).

Other

- Initiate community outreach with neighborhood residents or groups (as required).
- Provide monthly overall update reports.

Compensation

To minimize District costs, it is EHP's objective to work with the District to 1) identify sites that have the greatest likelihood for development to meet its housing objectives and 2) complete a preliminary analysis of these locations to determine which property or properties should be evaluated further. As noted above, EHP will require 30 to 60 days to complete the Phase I activities outlined above. Given the number of sites that the District is considering, and the unknowns related to these properties, this work will be billed on an hourly basis in accordance with Exhibit A. However, at the District's option, EHP can be retained at a blended hourly rate of $250 and a Not-to-Exceed (NTE) cap per site of $4,000.

Once Phase I is completed and the District agrees to a detailed study of a prospective housing site(s), EHP will initiate the preparation of the Feasibility Study as discussed above. The budget for Phase II is detailed in Exhibit B, during this period we propose:

- EHP will be paid a flat fee of $40,000 per site (EHP's fees for analyzing additional sites to the extent they are identified to meet the District's objectives would be discounted by 20%); and
- The District will pay or reimburse EHP for all out-of-pocket costs and for third-party consultants and related items, which are typically budgeted at $55,000 to $155,000 depending upon the specific scope directed by the District and based on the extent of existing site studies and reports.

It should be noted that the Feasibility Study is very detailed and provides a business plan for developing housing. The information contained in this report will allow the District to proceed with design, entitlement, and construction with a high degree of confidence in schedule and budget while knowing the project design. Other districts have found that our work allows them to expedite the development process with greater certainty and fewer surprises.

Third-Party Consultants

Given our experience developing multi-family housing in the Bay Area, we have strong relationships with numerous architects, engineers, and other consultants necessary to design, entitle and build housing. Based on our recent work experience, we would recommend engaging SVA Architects (https://sva-architects.com) and BKF Engineers (https://www.bkf.com) for this initial scope, but are open to working with the District to retain other firms with which it has worked that have specific expertise or knowledge. The budget outlined in section B has proven adequate to complete the Phase II scope as outlined above.

Let us know if you have any questions or comments. We look forward to working with you on these projects.

Sincerely,

Bruce Bortman
CEO

EXHIBIT A

EDUCATION HOUSING PARTNERS
PROFESSIONAL SERVICES RATE SCHEDULE:
PHASE I SERVICES

July 1, 2022 – June 30, 2023

Principal	$450.00/Hour
Senior Program Director	$300.00/Hour
Senior Project Manager	$200.00/Hour
Project Manager	$175.00/Hour
Senior Analyst	$125.00/Hour
Analyst	$105.00/Hour
Administrative Staff	$90.00/Hour

Subject to the terms of a professional services agreement:

· Charges for outside services, equipment, materials, and facilities not furnished directly by third-party consultants will be billed as reimbursable expenses at cost plus a 10% administrative charge. Such charges may include but shall not be limited to: printing and reproduction services; shipping, delivery, and courier charges; subconsultant fees and expenses; agency fees; insurance; transportation on public carriers; meals and lodging; and consumable materials.

· Allowable mileage will be charged at the prevailing IRS rate per mile.

· Monthly invoices are due within 30 days from invoice date. Interest will be charged at 1.5% per month on past due accounts.

EXHIBIT B

EDUCATION HOUSING PARTNERS
WORKFORCE HOUSING FEASIBILITY BUDGET:
PHASE II SERVICES (A)

Consultant	Low	High
Education Housing Partners, Inc.	$40,000	$40,000
Architects	$25,000	$40,000
Civil Engineer	$10,000	$15,000
Geotechnical Engineer	(B)	$10,000
Survey	(B)	$20,000
Misc. Consultants (Traffic/Biologist/Arborist/etc)	(B)	$20,000
Civil Engineer	$10,000	$20,000
Environmental (Phase I)	(B)	$5,000
Land Use/Contracts Counsel	$5,000	$10,000
Reimbursable Costs	$5,000	$15,000
	$95,000	**$195,000**

(A) Budget per site; EHP's fee for additional sites will be discounted 20%.
(B) Assumes report is already in District possession or not required.

Note: All third party costs will be billed on a "Not-to-Exceed Basis". Any budget not spent by consultants will not be invoiced. EHP can contract with all consultants and the District can reimburse EHP, or the District can contract directly with consultants. If EHP contracts directly with consultants, a 10% administrative fee is charged on all third party costs.

COMMENTS ON
INDEPENDENT CONSULTANT AGREEMENT FOR
PROFESSIONAL SERVICES DEVELOPMENT OF FEASIBILITY
STUDY REGARDING WORKFORCE HOUSING

Section 4 - Compensation. EHP's Phase II work is billed on a fixed price basis and billed monthly; contract anticipates hourly work.

Section 11 - Termination. Consultant should have a termination for cause provision; cure period should be increased and based on business days.

Section 12 - Indemnification. The Consultant's duty to indemnify should be limited to the District and its officers, employees and trustees. The Consultant should not be required to indemnify the District's "agents", "consultants", "representatives" and "volunteers". Additionally, the indemnification obligation should be tied to the Consultant's negligence as this will allow TDP to transfer the risk to its insurance carrier that will also benefit the District.

Section 15 - Compliance with Laws. In the event the District elects to terminate the Agreement for the Consultant's violation of the law, the District should follow the termination procedure set forth in Section 11.

Section 20 - Provisions Required by Law Deemed Inserted. This section is overly broad and robs the Consultant with the right to revise and respond to provisions which impose duties and obligations on the Consultant.

Add Provision - Limitation of Liability. Given the scope of services and Consultant's fee, the Consultant's liability should be limited to a reasonable amount while providing the District will access to the Consultant's insurance for any claims against the Consultant.

Add Provision - Waiver of Consequential Damages. This provides the Consultant the same protection with regard to consequential damages that Section 25 provides to the District. Additionally, consequential damages pose an unreasonable risk to Consultant and are not justified by the scope of services and the amount of the Consultant's Fee.

ALUM ROCK
UNION ELEMENTARY SCHOOL DISTRICT
2930 Gay Avenue, San José, CA 95127 · Phone: 408-928-6800 · Fax: 408-928-6416 · www.arusd.org

ADDENDUM 1 FOR
RFQ/RFP No. 2223-Bonds25

Development of Feasibility Study Regarding Workforce Housing

SEE CHANGES TO RFQ SCHEDULE:

Listed below is the "Tentative Timeline" which outlines pertinent dates of which firms responding to this solicitation should make themselves aware. See date change to **"Responses to Questions/Clarifications"**.

The District reserves the right to change the dates on the schedule without prior notice.

1.4. RFQ Schedule. District reserves the right to extend schedule dates by written addenda.

EVENT	TIME, DATE
Deadline for Written Questions Regarding RFQ/RFP	**4:00 P.M., Tuesday, January 10, 2023**
Deadline District's Response to Written Questions Timely Submitted. **Responses Posted on District website via Addenda.**	~~**4:00 P.M., Thursday, January 12, 2023**~~ **New Date: Friday, January 13, 2023**
Proposals Due	~~**4:00 P.M., Tuesday, January 17, 2023**~~ **New Date: Wednesday, January 18, 2023**
Interviews	**TBD – Selected firms will be contacted with a date**
Selection of Firm	**TBD**

Please submit a signed copy of this addendum with your RFQ/P response.

Company Name: EDUCATION HOUSING PARTNERS, INC.

Signature: [signature]

Print Name: BRUCE DORFMAN Date: 01/17/2023

ALUM ROCK
UNION ELEMENTARY SCHOOL DISTRICT
2930 Gay Avenue, San José, CA 95127 · Phone: 408-928-6800 · Fax: 408-928-6416 · www.arusd.org

ADDENDUM #2 FOR
RFQ/RFP No. 2223-Bonds25

Development of Feasibility Study Regarding Workforce Housing

Below are responses to questions presented in reference to the above RFQ/RFP.

Q & A

Q: Will the successful proposer be precluded from participating in any follow-on work for the Workforce Housing Project?

A: No.

Q: Has the District identified the potential real property sites from all existing District properties? If so, which sites have been identified?

A: No.

Q: If awarded the feasibility studies, would we be precluded from future housing work for Alum Rock Union School District?

A: No.

Q: Section 2.5.4.1. indicates K-12 and community college districts. Can we include Higher Ed relevant housing projects?

A: Please exclude Higher Ed.

Q. How is this project being funded and financed to maintain affordability?

A: GO Bonds.

Q. Does the District have current topographic and underground utility survey information available for each real property site?

A: No.

Q. Given that a hard copy is required and time is needed to print, and would it be possible to have additional time between RFI answers on the 12th and the RFQ due date of the 15th?

A: See updated timelines on the District's website.

Hilaria Bauer, Ph.D., Superintendent

Board of Trustees: Minh Pham, President · Corina Herrera-Loera, Vice-President
Andrés Quintero, Clerk · Ernesto Bejarano, Member · Linda Chavez, Member

Q. Is the District considering adaptive reuse of existing properties for housing use?

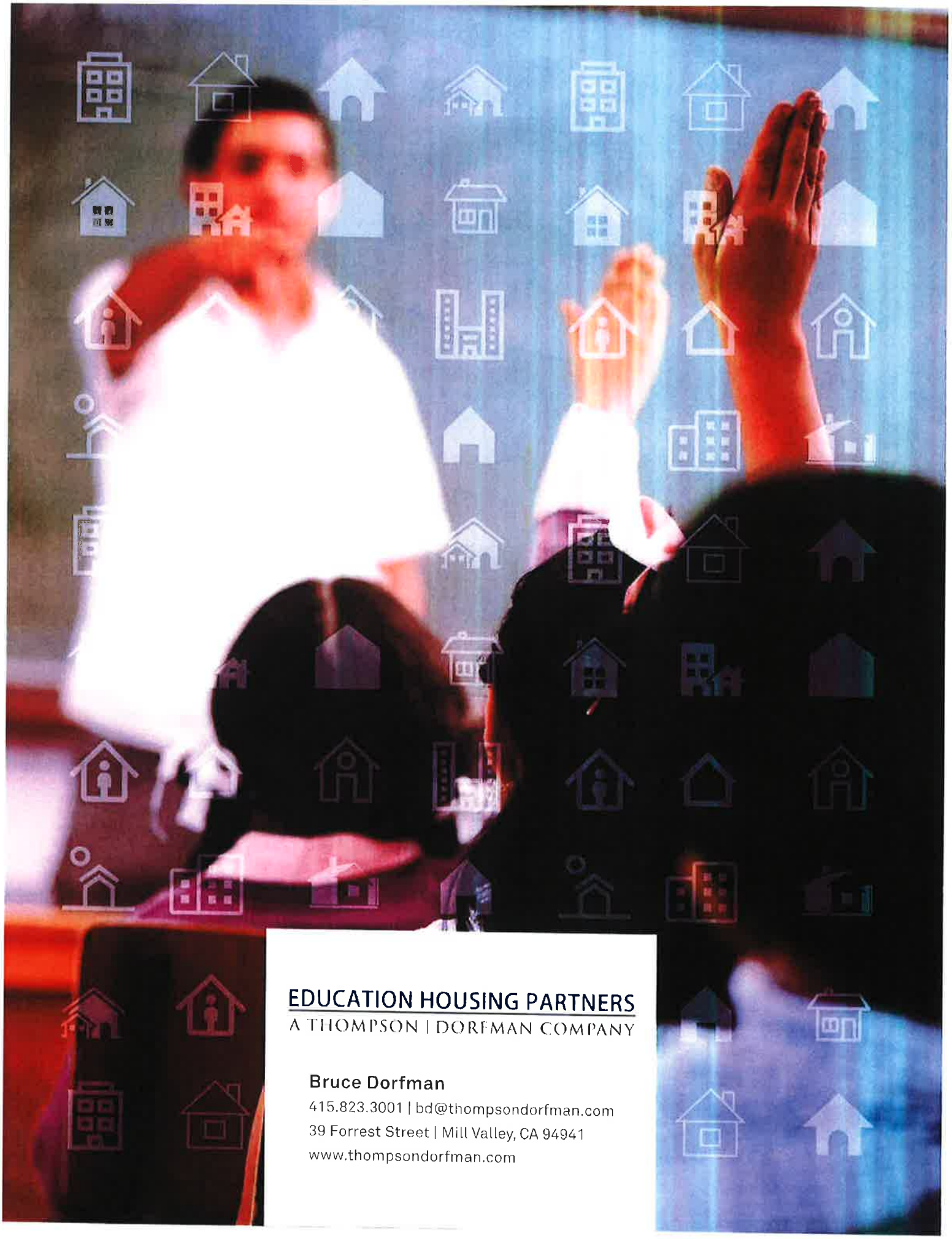
A: ***The District is open to this idea.***

Please submit a signed copy of this addendum with your RFQ/P response.

Company Name: EDUCATION HOUSING PARTNERS, INC.

Signature: [signature]

Print Name: Bruce Dorfman, CEO Date: 01/17/2023



EDUCATION HOUSING PARTNERS

A THOMPSON | DORFMAN COMPANY

Bruce Dorfman
415.823.3001 | bd@thompsondorfman.com
39 Forrest Street | Mill Valley, CA 94941
www.thompsondorfman.com

ALUM ROCK UNION ELEMENTARY SCHOOL DISTRICT

DEVELOPMENT OF FEASIBILITY STUDY REGARDING WORKFORCE HOUSING

RFQ/RFP NO. 2223-BONDS25

JANUARY 18, 2023

ORIGINAL



HED

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Section

1 Letter of Interest



EAH | Greenfield Commons Workforce Housing Development Site Plan

HED

WWW.HED.DESIGN

Boston
Chicago
Dallas
Detroit
Los Angeles
Sacramento
San Diego
San Francisco

417 Montgomery St.
Suite 400
San Francisco, CA 94104

T 415.981.2345
F 415.981.2343

January,16 2023

Attn: Kolvira Chheng, Assistant Superintendent of Business Services
Alum Rock Union School District
2930 Gay Avenue
San Jose, CA 95127

Re: Request for Qualifications and Proposals (RFQ/RFP) for Development of Feasibility Study Regarding Workforce Housing RFQ/RFP No. 2223-Bonds25

Dear Members of the Selection Committee:

We applaud the Alum Rock Union School District for tackling the critical affordable housing crisis faced by many public schools in California. As housing prices continue to increase, we realize that teachers and non-credentialed staff are unable to live within the communities where they work as they are priced-out of the market. Having educators in many of our own families, HED is grateful for this opportunity to submit our proposal to contribute to an enhanced quality of life for your staff that will ultimately lead to employee recruitment and retention within the District.

HED has assembled a team of experts from our PreK-12 and Housing market sectors that will collaborate with the District to understand your goals and provide you with architectural solutions focused on attracting, inspiring, and retaining staff from diverse backgrounds. Our team's strong and proven track record working with school districts, community engagement processes, site evaluation and analysis, planning, programming, and design of residential communities in a wide variety of contexts will contribute to your project's success. HED provides a unique set of built design experiences and feasibility study expertise for housing projects including living/ learning facilities; outdoor gathering and recreation spaces; adaptive re-use and new construction for residential housing with demonstrable in-house sustainable design.

On this pursuit, we are collaborating with BRIDGE Housing Corporation, a well-established nonprofit developer of affordable housing with 38 years in operations and 13,000 units of managed and owned housing as a consultant. In addition to HED's expertise, BRIDGE will play an advisory role given their extensive experience with similar projects. HED's leadership team has a working relationship with BRIDGE on current and past projects over the course of many years.

In addition to the qualifications above, HED is well-suited to support Alum Rock Union School District's workforce housing feasibility study program for the following reasons:

INSPIRATIONAL AND INNOVATIVE DESIGN

Our design team has successfully planned and designed more than 10,000 dwelling units for workforce, market-rate and affordable housing tenants, students and employees of major academic institutions across California and the United States. We recognize the values of economy, efficiency, flexibility, sustainability and technical expertise, and are eager to bring this experience to develop an architectural identity for your campuses/District.

HED

WWW.HED.DESIGN

AN INTEGRATED TEAM COMMITTED TO YOUR GOALS

Commitment to collaboration must be demonstrated, not simply professed. Our team has proven history of successfully delivering complex projects with a collaborative and client service-oriented approach built on community consensus resulting from open, transparent communication.

LEADERS IN HOUSING FACILITIES AND K-12 IN ONE FIRM

Our philosophy is to create living-learning environments for the 21st century that maximize your resources in support of staff well-being and community development. This philosophy is rooted in three basic themes: context, economy, and stewardship. Context; to reinforce the identity of Alum Rock USD and reflect its core mission in a residential setting while breaking down the stigma surrounding affordable housing and respecting the existing community context; Economy; to assure the project(s) make financial sense on a first-cost and operational basis; Stewardship; to provide a responsible approach to the physical environment through sustainable site development and building design. As an expert in both K-12 and Housing project types, HED melds knowledge and best practices from these market segment to deliver design excellence.

TRUE PARTNERS FOR SUCCESSFUL DELIVERY

We are keenly aware that listening, synthesizing and consensus building is the foundation for a successful design process. Our team embraces this approach to deliver buildings that promote dialogue and foster an inclusive culture that values diversity. Our team's strengths lie in our ability to listen, understand and work flexibly with a wide range of stakeholders, to prioritize and create consensus to maximize positive outcomes for Alum Rock Union School District.

DESIGNING FOR RESILIENCE AND SUSTAINABILITY

Even before the pandemic, HED increasingly designed buildings to be resilient, multi-use, fluid in program and able to adapt. We have developed a way to integrate this flexibility into our designs without producing generic buildings, principally by customizing the user experience at each scale – site/campus, building, and interior. We understand that Districts have limited budgets and we continually seek ways to maximize your resources to save on operating expenses while creating exciting and compelling facilities that align with your vision.

Each of our HED team members bring a diverse and extensive background in PreK-12 and housing projects to unlock the potential of your real property sites. We look forward to your review of our proposal and the opportunity to meet with you, introduce our team, and engage in dialogue about this exciting scope of work. Should you have any questions, please feel free to contact us.

Sincerely,

Rob Filary, AIA
PreK-12 Sector Leader + Design Leader
707.380.5253
rfilary@hed.design

Otis Odell AIA, LEED AP
Housing Sector Leader
213.542.4522
jodell@hed.design

Section

2 Table of Contents



CRP Affordable Housing | American Canyon, Napa County

Contents

1 Letter of Interest 1

2 Table of Contents 3

3 Executive Summary 4

4 Proposed Personnel 6

5 Narrative 10

6 Additional Data 20

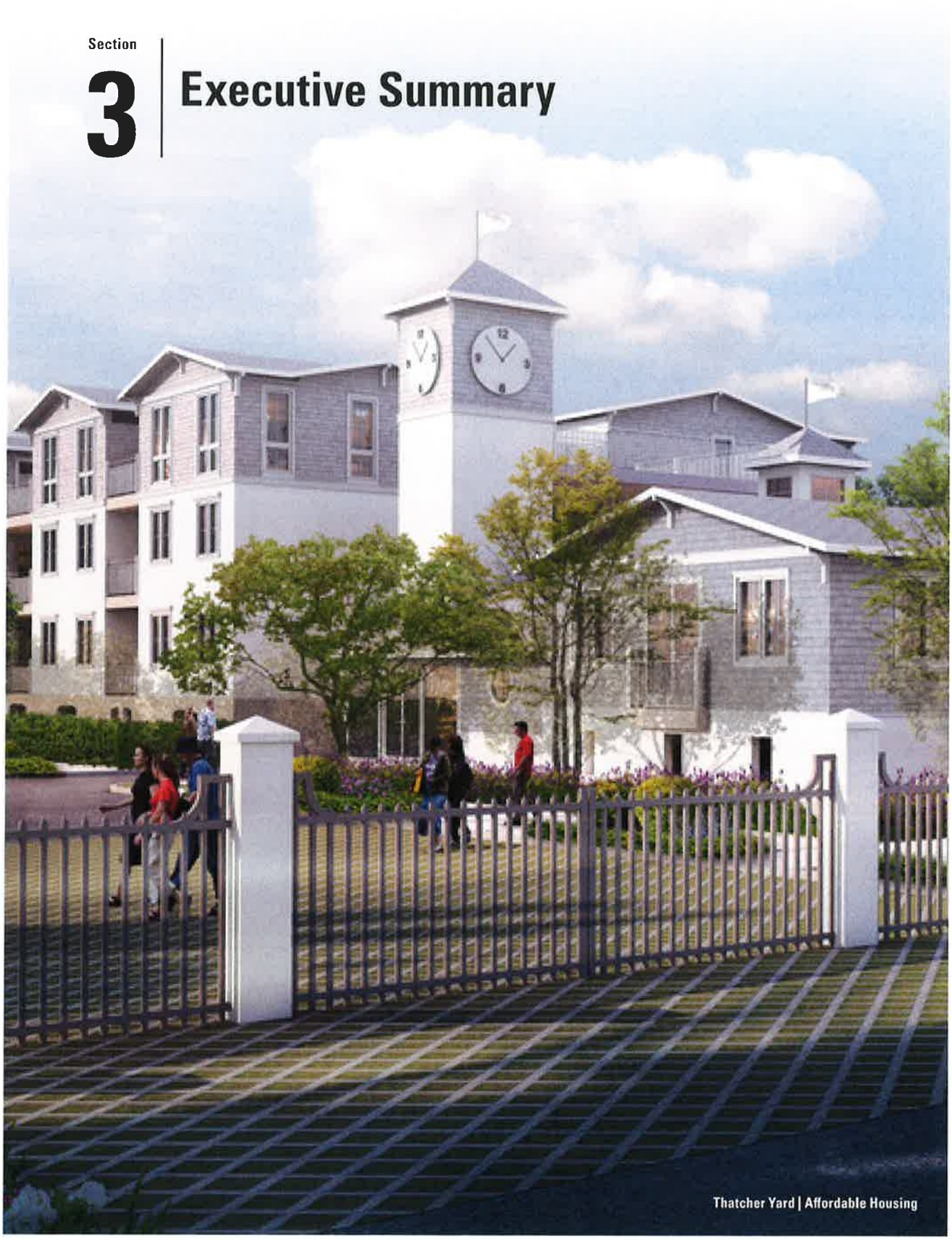
7 Firm's Current Commitments 25

8 Proposal 26

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Section

3 Executive Summary



Thatcher Yard | Affordable Housing

Executive Summary

HED architects are professional, responsive, and seek to meet the needs of their clients. They are adept at working with multiple entities on a single project, anticipating the needs of each group, and arriving at mutually agreeable solutions."

Derk Garcia, Superintendent
Roseville City School District

PROJECT APPROACH

HED's expertise and depth of affordable and workforce housing feasibility studies will support ARUSD's goal of providing attainable housing for teachers and staff within the community. The current housing climate near the District's campuses creates affordability barriers that may have significant impact on staff commute times and quality of life. As a firm that has designed more than $1 billion in workforce and affordable housing, completed upwards of 9,000 beds of housing on community college and 4-year university campuses and has a strong track record of successful projects on K-12 campuses, our well-rounded experience will bring best practices to ARUSD's feasibility study to determine where workforce housing will make the most sense from a livability and community context standpoint.

Using HED's GOALS, STRATEGIES and RESULTS process, as described further below, we will work with the district to identify and prioritize projects goals:

- Identify and evaluate under-utilized real property sites.
- Provide affordable and/or below market housing options to ARUSD's workforce to aid in ARUSD's recruitment and retention of qualified teachers and staff.
- HED will collaborate with the District to evaluate sites, engage with community, study options for type and quantity of housing, articulate housing programs, and develop plans addressing housing solutions for specific sites.

GOALS

Our first step is to establish goals and develop a shared definition of success with ARUSD. This is a critical part of the discovery process and will result in mutual quantitative and qualitative goals. Quantitative goals include the program, typology and infrastructure requirements, while qualitative goals will start to define the look and feel of the project and community to be created.

Goal setting is a collaborative process, and based on our understanding of your objectives, we can suggest a series of overlapping issues for ARUSD and HED to explore together.

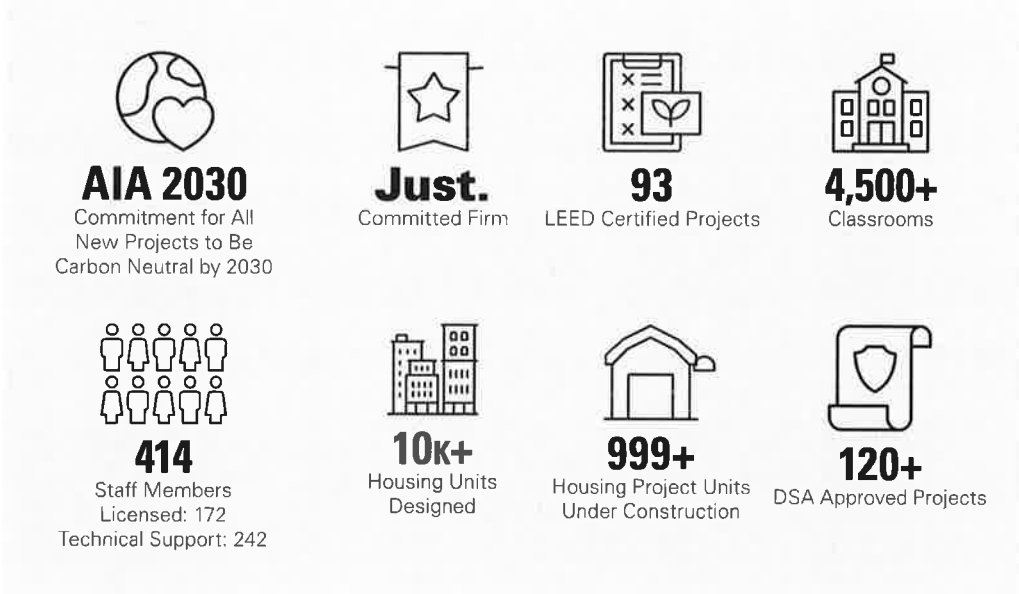
- Budget & Schedule: Minimize interruption while maximizing the impact of every dollar spent.
- Supporting Your Mission: Reflect ARUSD's culture and create concepts that embody your mission.
- Sustainability, Health & Well-Being: Living your values and supporting the health of your people and the community at large.
- Adaptability & Flexibility: Meeting ARUSD's needs as they evolve over time.
- Community Integration: Working with local communities and city agencies to identify how housing can be integrated effectively.

STRATEGIES

Project success relies on identifying the appropriate strategies to meet each of the project goals. Understanding your organization, users, community, residents and what they value is how we determine design strategies that will result in concepts that serve your needs now and into the future. As part of our commitment to create positive impact, performance and sustainability targets are identified early in the process. Our team can offer an array of options for meeting performance goals and delivering healthy and sustainable approaches. Strategies are contingent on the project goals we develop as a team and could include identifying unique housing typologies, for energy or resource savings, analyzing the existing context, creating standards, planning concepts, test fits, the arrangement of program spaces, existing or predicted program needs, and the interaction among all parts of each specific site. In addition, the aspect of public outreach and engagement is a strategy to be developed.

RESULTS

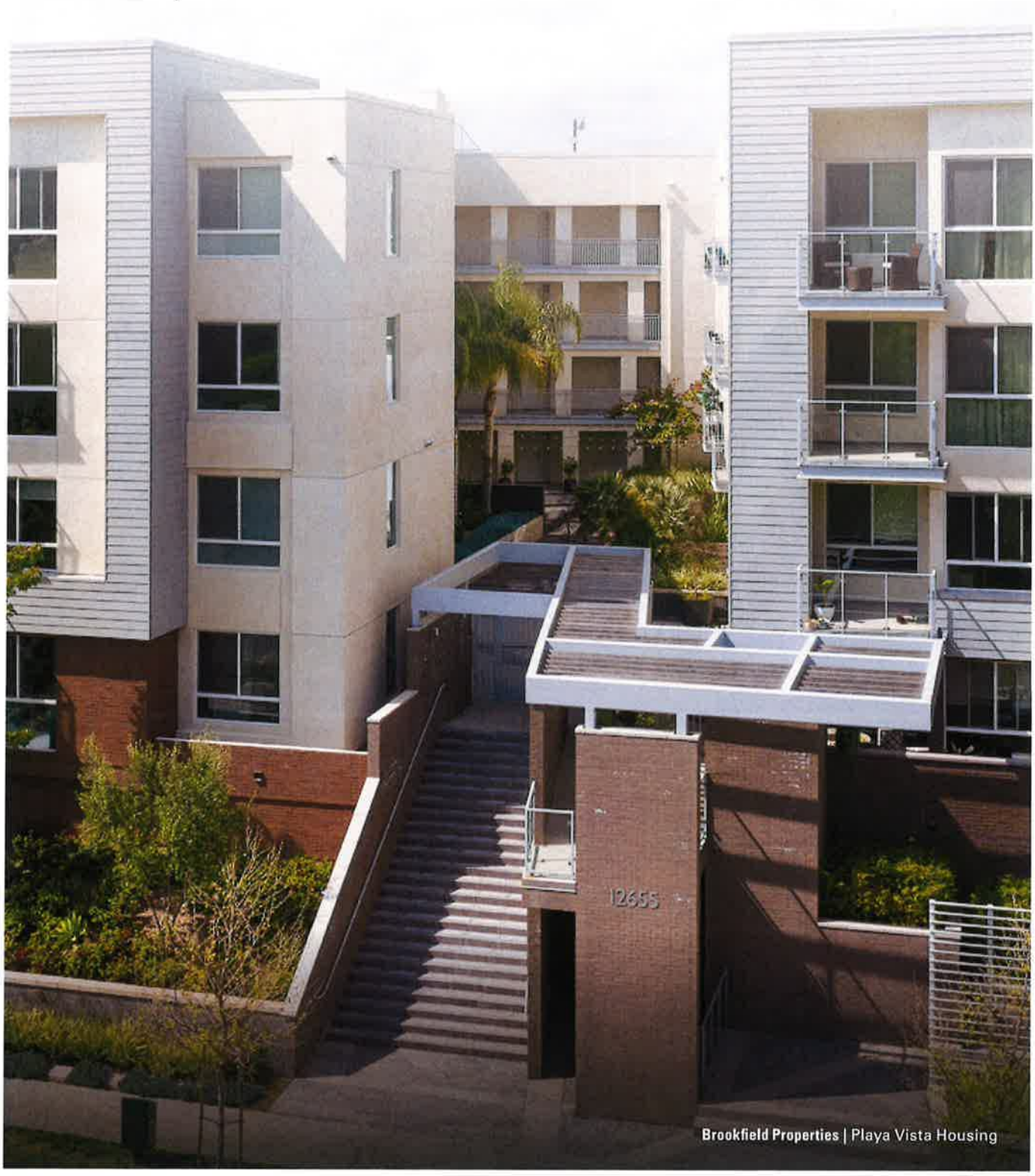
Our team provides the required skills of management, sensitive intervention, and progressive design based on a clear understanding of ARUSD's goals, working culture, and expectations. We offer a wealth of experience and knowledge of options to address these challenges head-on. A strong partnership between the design team and the ARUSD's project team will engage team members in open communication from programmatic needs analysis to developing concepts that embody the overall mission and future goals.



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Section

4 Proposed Personnel



Brookfield Properties | Playa Vista Housing

Organizational Chart



Rob Filary AIA
Principal-in-Charge and Primary Contact
HED

Mary Ruppenthal AIA, LEED AP, DBIA
Pre K-12 Sector Leader
HED

Leah Marthinsen AIA, LEED AP
Project Manager
HED

Otis Odell AIA, LEED AP
Housing Sector Leader
HED

Rick Castillo AIA, NCARB
Housing Sector Leader
HED

Brad Wiblin
Development Consultant
BRIDGE HOUSING CORP.

Christopher Coates AIA, LEED AP
Project Designer, Housing Specialist
HED

Erin Pleticha
Project Designer, Housing Specialist
HED

Kathryn Defay
Cost Estimator
TBD CONSULTANTS

STAFFING AND ROLE DEFINITIONS

Our team has the capacity and availability for the full life of this project.

Principal in Charge | Rob Filary

Rob Filary will be the principal in charge and will be responsible for the oversight of the project and is ultimately responsible for the quality of services that the firm delivers. His responsibilities include coordinating staff and firm resources to ensure the project is completed on schedule and within budget, and work in close collaboration with the team throughout all phases to lead the QA|QC of all project deliverables to ensure that the work is complete, well-coordinated, and timely.

Community Engagement | Mary Ruppenthal

Mary Ruppenthal will be the responsible for community engagement for this project. She will coordinate a series of collaborative, interactive workshops throughout design. She will explore a variety of scenarios, ideas and opportunities that support the vision of ARUSD. As the team refines the design, workshops will focus on technical issues and building performance to achieve the optimal value for your investment.

Housing Sector Specialists | Otis Odell and Rick Castillo

Otis and Rick lead HED's Housing and Mixed-Use Studio and provide extensive experience in the planning and design of multi-family housing. They are experts in project research, analysis, and preparation of comprehensive feasibility studies necessary to evaluate a site's development potential. They will provide project oversight to help identify, conceptualize, and bring this project to life alongside ARUSD. They will evaluate opportunities for modular and prefabricated construction solutions to add value and expediency to the district. In developing the feasibility studies, they will oversee the approach and viability of each site for a potential housing solution and support in necessary community outreach initiatives by interacting with the local community and demonstrating what types of housing and what densities are being proposed.

Project Manager | Leah Marthinsen

Leah Marthinsen will be the project manager responsible for day-to-day client relations, leadership of the project team, and management of scope, schedule, and budget to assure proper delivery of the project. She will track and coordinate all project efforts and provide written and verbal reports on all activities and will be responsible for facilitating communication between the design team to ensure the technical execution is consistent with the planning and design direction of the project.

Project Designers | Erin Pleticha and Christopher Coates

Erin and Christopher will work with Otis and Rick to create design concepts that meet the requirements of ARUSD and that ultimately provide housing and distinctive places that are suitable to the required use. They will meet with the District early on to ascertain all the requirements and nuances of the feasibility study.



Rob Filary AIA

Principal-in-Charge and Primary Contact | HED

A licensed architect since 2004, Rob is versed in all aspects of the architectural process, from conceptual design to construction administration. Rob is adept at listening to clients' needs and developing design schemes that fit within their scope and budget, while always striving to push the limits of creativity.

EDUCATION
Master of Architecture
North Carolina State University

CREDENTIALS
Registered Architect: MI, NV
Vibrant Learning Environments Certification (A4LE)
Crime Prevention Through Environmental Design (CPTED) Certification

San Mateo-Foster City SD
Bowditch MS Gymnasium, Library, Counseling, Classroom Bldgs
Foster City, CA

East Side UHSD
Yerba Buena Performing Fine Arts Classroom and Theater Bldg.
San Jose, CA

Palo Alto USD
- Palo Alto HS Tower Bldg Modernization
- Gunn HS Administration and Food Service Bldg

Palo Alto, CA

Menlo Park City SD
Encinal ES and Oak Knoll ES Transitional Kindergarten Planning and Modernization
Menlo Park, CA

Livermore Valley JUSD
Classroom and Student Union Bldg.
Livermore CA

California State University*
Lower Residential Student Housing Feasibility Study
Vallejo, CA

*Experience Acquired from Prior Firm



Mary Ruppenthal AIA, LEED AP, DBIA

Pre K-12 Sector Leader | HED

Mary is a licensed architect who brings a swiss army knife skillset in educational planning, design, construction, project management, leadership and mentoring experience with over 27 years of professional architectural practice and expertise, specializing in California Pre K-12 projects.

EDUCATION
Master of Architecture
University of California, Berkeley

CREDENTIALS
Registered Architect: CA
LEED Accredited Professional
Design-Build Professional
CSI CDT
BPA

Folsom Cordova USD
Folsom MS Measure G Modernization
Folsom, CA

Mount Diablo USD
Educational Specifications and District Standards
Concord, CA

San Mateo UHSD
Aragon and Mills HS Façade and Outdoor Learning Improvements
San Mateo, CA

City College of San Francisco
Evans Center Workforce Campus Modernization
San Francisco, CA

San Francisco USD
- Abraham Lincoln HS New Classrooms, Modernization of Existing Campus
- Mission HS Modernization

San Francisco, CA

Tenderloin Neighborhood Development Corporation
New Curran Housing
Maria Manor Housing Modernization

*Experience Acquired from Prior Firm



Leah Marthinsen RA, LEED AP

Project Manager | HED

Leah has over ten years of architectural experience in all phases of construction, from preliminary programming through construction administration, with strong analytical and graphic skills. She is adept at collaborative design efforts and developing effective relationships with project partners, including contractors, engineers, and clients.

EDUCATION
Master of Architecture
California College of the Arts

CREDENTIALS
Registered Architect: CA
LEED Accredited Professional

East Side JHSD
Yerba Buena Performing Fine Arts Classroom and Theater Building
San Jose, CA

Livermore Valley JUSD
Livermore HS Classroom Renovations
Livermore, CA

Menlo Park City SD
Encinal ES and Oak Knoll ES Transitional Kindergarten Planning and Modernization
Menlo Park, CA

Mount Diablo USD
Educational Specifications and District Standards
Concord, CA

Palo Alto USD
- HS Tower Bldg. Modernization
- Palo Alto HS Water Service
- Palo Alto HS Firm Alarm
- Palo Alto HSAdministration Bldg.

Palo Alto, CA



Otis Odell AIA, LEED AP

Housing Sector Leader | HED

Otis Odell has experience with housing projects of all typologies both local to the State of California and throughout the country including market rate, high-rise, affordable, and senior housing. Most recently, he has worked on multiple affordable housing developments in the City of Los Angeles and a large scale residential mixed use development in the City of Pasadena.

EDUCATION
Bachelor of Environmental Design
University of Colorado

CREDENTIALS
Registered Architect: CO
LEED Accredited Professional

EAH Housing
Greenfield Commons
Greenfield, CA

Thomas Safran & Associates, Inc.
- Vista Terrace Apartments
- Thatcher Yard

Los Angeles, CA

University of Southern California
Expo Point Student Housing
Los Angeles, CA

West Hollywood Community Housing Corporation
1055 S Mariposa
Los Angeles, CA

CRP Affordable Housing
- Poppy Grove
- Suyenaga Density Study - Elk Grove
- 41705 Hawthorne Ave Murrieta
- 9149 Skyway Paradise
- 5945 Mission Gorge
- American Canyon Napa County

American Canyon, Elk Grove, San Diego, CA

AMLI Residential
AMLI Old Pasadena Apartments
Pasadena, CA

Multiple Affordable housing projects in Colorado*

*Experience Acquired from Prior Firm



Rick Castillo RA

Housing Sector Leader | HED

With extensive experience in Architecture, Design, and Construction, Rick Castillo is respected for his pragmatic approach to project design and ability to lead multiple user groups, consultants, and construction professionals. His extensive portfolio includes master planning, housing feasibility studies and design of ground-up housing and adaptive reuse of existing buildings for conversion into housing, mixed use and high-rise projects for prominent clients throughout California.

EDUCATION
Bachelor of Architecture
California State Polytechnic University, Pomona

CREDENTIALS
Registered Architect: CA

NH Design Collaborative, LLP
Palmilia Mixed Income Housing
San Francisco, CA

BRIDGE Housing Corporation*
Ohlone Court Affordable Apartments
San Jose, CA

The Sobrato Organization*
Race Street Apartments
San Jose, CA

Irvine Company*
Riverview Mixed Use TOD
San Jose, CA

Bond Companies
- Inspire Echo Park Housing
- DTLA Kia Site
- University City

Los Angeles, CA

AMLI Residential
AMLI Old Pasadena Apartments
Pasadena, CA

Thomas Safran & Associates, Inc.
Thatcher Yard Affordable Housing
Los Angeles, CA

McCormack Baron Salazar, Inc.
Parque Vista Affordable Housing
Los Angeles, CA

* Prior firm experience



Brad Wiblin

Development Consultant | BRIDGE Housing Corp.

Since joining BRIDGE in 1994, Brad has completed the development of over 2,000 units of affordable and market-rate housing in San Jose, Irvine, Carlsbad, San Marcos and San Diego. His experience includes some of BRIDGE's most complex transit-oriented developments, including MacArthur Station in Oakland, COMM22 in San Diego, and Balboa Park in San Francisco.

In 1998 he opened BRIDGE's San Diego office, establishing a solid foundation for BRIDGE's expanded presence in Southern California. Currently based in San Francisco, he leads the company's Business Development Group, which sources and acts on development and acquisition opportunities and positions BRIDGE to enter new markets.

Prior to BRIDGE, Brad was a land planner and urban designer primarily responsible for the design elements of residential and mixed-use communities. He is an associate member of the Urban Land Institute and a member of the Residential Real Estate Committee of the University of San Diego. He has a B.S. in Design from Arizona State University and a Master's in City and Regional Planning from UC Berkeley.

EDUCATION
Masters, City and Regional Planning, UC Berkeley
Bachelor of Science, Design
Arizona State University

CREDENTIALS
Member, Urban Land Institute.
Member, Residential Real Estate Committee, University of San Diego



Erin Pleticha

Project Designer, Housing Specialist | HED

Erin's professional experience on housing, healthcare, science and technology, administrative facilities, and higher education projects includes client contact and presentations, work with construction documents and construction administration—everything from drafting drawings to making field visits and managing closeouts.

EDUCATION
Master of Architecture
Roger Williams University

Bachelor of Science
Architecture
Roger Williams University

NH Design Collaborative, LLP
Palmilia Multi-Family Housing
San Francisco, CA

Thomas Saffran and Associates
Thatcher Yard
Los Angeles, CA

Walter N. Marks, Inc.
5411 Wilshire Mixed-Use High-Rise
Los Angeles, CA

University of Southern California
The Village at USC
Los Angeles, CA

Redwood City SD
Garfield Community School Phase 1
Menlo Park, CA

University of California, Davis
Chemistry Master Plan / Chem. Annex
Latitude Dining Commons
Davis, CA

University of California, Irvine
College of Health Sciences and Nursing
Irvine, CA

Ford Motor Company
Research and Innovation Center
Palo Alto, CA



Christopher Coates AIA, LEED AP

Project Designer, Housing Specialist | HED

Chris Coates is an experienced senior project designer with experience working, leading and mentoring in the architecture and planning industry. His depth of expertise spans across the design of multi-family housing, Type V, Type III, and Type I construction, and modular project types.

EDUCATION
Master of Architecture
Harvard University

Bachelor of Architecture
Woodbury University

CREDENTIALS
LEED Accredited Professional

CRP Affordable Housing
- American Canyon Napa County
- Suyenaga Density Study
- Poppy Grove

American Canyon, Elk Grove, San Diego, CA

Entelechy Group, LLC
Downtown Modesto Development
Modesto, CA

Mirka Investments
158 Seaward Ave
35824 Whitewood Road
San Diego, CA

Lowe Property Group*
- 6th & Main
- Sugar Alley

Salt Lake City, UT

The Ezralow Group*
Sierra Gateway Apartments
Rocklin, CA

ED 1125, LLC (R Cap Avenue 34, LLC)*
Avenue 34 Apartments
Los Angeles, CA

*Experience Acquired from Prior Firm



Kathryn Defay

Cost Consultant | TBD Consulting

Kathryn is a Senior Cost Estimator for TBD Consultants working on all aspects of cost planning. Kathryn's responsibilities include preparing cost estimates from construction documents, estimate and takeoff quantities for all design phases, communicating and obtaining bids from vendors and subcontractors, ensuring approved project budget and schedule are maintained, and identifying cost savings while maintaining the integrity of the design.

EDUCATION
Architecture and Bachelor of Science
Costume and Textile Design,
University of California, Davis

UC Berkeley
Student Housing
Berekley, CA

College of Marin
Learning Resource Center
Marin, CA

Protrero Yard
Modernization Project | Mixed use Bus Yard, Offices and Residential housing
San Francisco, CA

Lake Tahoe Community College
C Remodel for Efficiency/ Science Modernization Project
Lake Tahoe, CA

Yuba City College
Performing Arts
Yuba County, CA

Fairfield-Suisun USD
Fairfield High School Performing Arts
Fairfield, CA

San Jose USD
Ohlone Middle School
Roofing Modernization – JK Architecture and Engineering
San Jose, CA

Section

5 Narrative



2.5.1. STATEMENT OF SERVICES

ARUSD is interested in determining the feasibility and viability of designing, constructing and maintaining affordable (below market) workforce housing for ARUSD employees. The scope of work is the analysis of available ARUSD property for the development, recommended building typologies, densities, unit mix, sizes, types, amenities, open space and estimated overall cost. Included in this analysis is the application of State of California specialized housing programs and incentives.

This RFP contains a listing of all ARUSD's real property sites. All the sites listed may be considered for a workforce housing development. Several of the locations are contained together in a school site. We estimate that approximately 30 school sites will encompass the studies.

SCHOOL	TYPE
Ace MS	Charter School Site
Adelante I and Adelante II	Small School Sites
Alpha: Jose Hernandez MS	Charter School Site
Alpha: Blanca Alvarado MS	Charter School Site
Aptitud	Charter School Site
Cassell	Elementary School Site
Cesar Chavez Early Learning Center	Elementary School Site
Cureton	Elementary School Site
Dorsa	Elementary School Site
DCP	Charter School Site
Escuela Popular	Charter School Site
George	Middle School Site
Hubbard	Elementary School Site
Kipp Heartwood	Charter School Site
Kipp Prize	Charter School Site
Linda Vista	Elementary School Site
LUCHA	Small School Site
Lyndale	Elementary School Site
McCollam	Elementary School Site
Meyer	Elementary School Site
Ocala	Middle School Site
Painter	Elementary School Site
Renaissance at Fischer	Small School Site
Renaissance at Mathson	Small School Site
Rocketship Si Se Puede	Charter School Site
Rocketship Brilliant Minds	Charter School Site
Rocketship Fuerza	Charter School Site
Russo/McEntee	Elementary School Site
Ryan	Elementary School Site
San Antonio	Elementary School Site
San Juan Bautista	Charter School Site
Sheppard	Middle School Site
Summit Tahoma	Charter School Site
Voices	Charter School Site

2.5.2 PROPOSED SCHEDULE OF SERVICES

Stage-1: Research and Analysis:	Duration
HED and ARUSD Kick-off Meeting:	1 day
Background Research and Analysis:	2 weeks
Site Visits and Assessment Tasks:	2 weeks
Determine Initial Feasibility Inventory for Stage 2A:	1 week
Research and Analysis Workshop with HED and ARUSD	1 day

Stage-2A: Feasibility Study:	
Feasibility Study per site	2 weeks per site
Presentation of Feasibility Studies to ARUSD:	1 day
Participate in Community Outreach Meetings as requested by ARUSD:	TBD

Step 2B: Feasibility:	
Prepare Additional ARUSD Requested Feasibility Studies:	2 weeks per site
Presentation of Additional Feasibility Studies to ARUSD:	TBD
Participate in Community Outreach Meetings as requested by ARUSD:	TBD

Stage-3: Summary of Findings Report:	
Compile Site Feasibility Studies into Final Report with Cost Estimate	2 weeks per site

Stage-4: Presentation:	
Facilitate workshop with ARUSD to Review draft Board Presentation.	1 day
Incorporate Workshop Comments into Final Report:	1 week
Present Final Report(s) to ARUSD Board:	1 day
Follow up with questions and comments:	As needed

PROJECT SERVICES

Based on the requirements contained in the RFP and HED's project understanding, we are pleased to offer the following design services to address the needs of the project sites under consideration by ARUSD.

PROJECT SCOPE

The project scope is outlined based on ARUSD's goals for assessment of each school site. We anticipate this scope of work to apply on a site-by-site basis within the overall context of ARUSD property.

STAGE-1: RESEARCH AND ANALYSIS

Objective:

Perform initial review and research for each site through site visits and analysis to determine development potential and make recommendations to ARUSD.

- Facilitate team kick-off meeting with ARUSD to initiate work
- Review ARUSD documents available for each site and analysis. These documents include topographic surveys, property boundaries, existing school facilities and other relevant information.
- Prepare a land-use analysis, review of zoning ordinances (as applicable), design standards, context and other site-specific requirements that may affect the subject property.
- Preliminary assessment of topography, terrain, natural site features and special characteristics.
- Review applicable state and local density bonus alternatives, incentives/waivers for affordable housing that may apply to the project sites.
- Review codes and ordinances effecting subject property
- Analyze Sustainable approaches and opportunities.
- Review sensitive edges/anticipated setbacks.
- Study anticipated density/typology/programming options
- Create a preliminary list of potential development constraints Issues may include but are not limited to:
    - Existing site configurations and constraints.
    - Traffic/ingress-egress limitations.
    - Potential Right of way expansion/deceleration lanes, bike lanes, etc.
    - Fire/Emergency Vehicle Access (EVA).
    - Topography.
    - Easements.
    - Potential environmental issues.
    - Potential architectural design style restrictions.
- Prepare recommendations for feasibility inventory for Stage-2 tasks.
- Participate in meeting to review research with ARUSD.

STAGE-2A AND 2B: FEASIBILITY STUDY

Objective:

Prepare initial site planning studies based on Stage-1 selected sites to determine preliminary development potential. This scope of work is on a site-by-site basis.

We estimate approximately 2-3 sites feasibility studies for Stage-2A and the number of feasibility studies in Stage-2B to be determined. Tasks performed for Stage-2A and 2B on a site-by-site basis:

- Apply necessary information from research and analysis stage affecting subject property development potential.
- Prepare Site Analysis, Opportunities and Constraints Diagrams.
- Indicate relationship between existing school facilities and potential housing development interface where applicable.
- Prepare site master plan indicating area of development, building types and overall project development program including the following information:
    - General building shaping, placement, and orientation.
    - Approximate unit count range and parking count range.
    - Depict plausible vehicular circulation, parking, and potential EVA requirements
    - Site access and circulation.
    - Building typology (walk-up, podium, wrap or other configurations)
    - 3D massing diagrams
    - Preliminary sections to indicate heights and number of floors.
- Estimate of overall cost for each potential development.
- Participate in community engagement meetings as required or requested by ARUSD.

STAGE-3: SUMMARY OF FINDINGS REPORT

Objective:

Compile site specific research, and feasibility studies from Stages-1 and 2, on a site by site basis, into a comprehensive report for presentation to ARUSD.

- Provide recommendations for potential workforce housing sites.
- Provide a narrative describing the methodology employed as the basis for findings indicated the report.
- Include all research, site studies, analysis and other relevant information necessary to convey the report findings.
- Include conceptual cost estimate.

STAGE-4: PRESENTATION

Objective:

Present report and findings to the ARUSD Board as outlined in the summary report for deliverables prepared in Stages-1 through 3.

- Facilitate workshop with ARUSD to Review draft Board Presentation and incorporate comments into final presentation.
- Create presentation of project report in digital and hard copy formats for ARUSD Board review prior to presentation.
- Respond to questions and comments from Board members during presentation and in follow up as occurs.

ARUSD Provided Information:

- Digital ALTA survey with boundary information, easements, and topography.
- As-built drawings of existing school as applicable.
- Similar project reference documents relevant to each site as described above.

2.5.3. FIRM INFORMATION

Type of Ownership:

HED is a Privately Owned Corporation, incorporated and headquartered in Michigan. HED is not minority or woman owned. Our FEIN is 38-2645558.

Location Performing Services:

417 Montgomery St. | Suite 400
San Francisco, CA 94104
T 415.981.2345 | F 415.981.2343
www.hed.design

Main Point of Contact:

Rob Filary AIA
Associate Principal | Architecture Design Leader
rfilary@hed.design
d 415.510.6691 I c 707.380.5253

Senior Officials

Michael Cooper | President
Peter Devereaux | Chairman and CEO
Enrique Suarez | Market Sector Leader
Tania Van Herle | Corporate Operations Leader

2.5.3.1. History of the Firm

Founded in 1908 as Harley & Atcheson, HED has a long and rich history dedicated to the design of the built environment. Our growth from a collection of regional offices to a national practice has involved strategic alliances and careful crafting of a cohesive network of comprehensive services across the country, but after more than 114 years of continuous operation, HED remains focused on our founding mission: using our talents as design professionals to deliver creative solutions to complex challenges. We can trace our roots in the Pre K-12 field back to the Coldwater State School Training/Trade School in Coldwater, MI in 1944.

We have a strong knowledge of the funding and governance of public school facilities, and we are experienced in working with school communities to build consensus.

In Northern California, we have supported the following Districts on whole site modernization, additions/alterations to existing facilities, and new construction projects for East Side UHSD, San Mateo Foster City SD, Folsom Cordova USD, Fremont Union HSD, Jefferson Elementary SD, Mill Valley SD, Mountain View Whisman SD, Petaluma Joint UHSD, Menlo Park City SD, Redwood City SD, Reed Union SD, Roseville City SD, San Francisco USD, Tamalpais UHSD, West Contra Costa USD, Hillsborough City SD, San Rafael City Schools, Livermore Valley Joint USD, Dublin USD, and Palo Alto USD.

LOCATIONS

Boston
Chicago
Dallas
Detroit
Los Angeles
Sacramento
San Diego
San Francisco

MARKET SECTORS

Community and Civic
Government (Federal)
Healthcare
Higher Education
Housing and Mixed-Use
Mission Critical
Pre K-12
Science
Transportation, Manufacturing and Product Development
Workplace

SERVICES

Planning

Master Planning
Laboratory Planning

Architecture and Design

Architecture
Experiential Graphics
Interior
Landscape

Engineering

Electrical
Mechanical and Plumbing
Structural
Information and Communications Technology Design (ICT)

Consulting

Sustainable Design
Net Zero

"Providing a person with a place to live is truly life-changing. To me, that's the definition of success: **making a positive impact in people's lives**. In all of my housing and hospitality work, I am committed to addressing livability as a critical component of design so that we can continue to make a difference."



Otis Odell AIA, LEED AP
Housing Sector Leader | HED

2.5.3.2. FIRM'S PHILOSOPHY

At HED we believe collaboration, team diversity, and rigorous exploration lead to exceptional solutions and, when executed properly, will result in a positive impact. To deliver on this, we will engage with the District to understand key goals and define desired outcomes; we will assemble the right team that brings different perspectives and expertise; and we will exercise critical thinking to explore and evaluate alternatives. In this instance, HED's unique offering brings exceptional understanding of multiple market sectors. That is, after completing dozens of Pre-K-12 projects, we understand the intricacies and protocols associated with working with School Districts and, after completing over 10,000 units of housing, we understand the planning criteria, building typologies, and development approaches for housing work. Our team is composed of Pre-K-12 leaders and housing leaders who will remain engaged throughout the work, bringing the diverse experience that is required for this assignment. Moreover, for this work we have brought an affordable housing developer to the team who has completed built projects on school district properties in California and can advise and inform based upon direct experience. Our Pre-K-12 leaders will assure that our team is "speaking your language" throughout the process as the broader team explores planning solutions for the various sites. For this reason, we expect that our Pre-K-12 leaders will facilitate the meetings and the exchange of information between HED and ARUSD.

We have discussed our process that focuses on Goals, Strategies, and Results. This means that our team will facilitate meetings with your personnel, your committees, and your stakeholders specifically to identify and document the District's goals. Expertise in multiple sectors will assure that the right questions are being asked. We will collaborate with the District to develop strategies for achieving density (the number of units per acre on the site), desired economic outcomes, integration into neighborhoods, livability, affordability, and community outreach. Ultimately, the District will be positioned to "tell the story" about the positive impact that resulted from this effort.

We have systems in place that we will use to manage information. We maintain logs that will be shared with stakeholders to assure that we document, track, and resolve the issues associated with the planning effort.

HED will prepare and distribute minutes from our team meetings assuring we have an accurate record of the project from beginning to end. Regular meetings will be established to keep the District informed of progress and create a forum for dialogue and critique of alternative studies.

Finally, we will bring enthusiasm, a spirit of collaboration, and innovation to this exciting and important work.

VALUE ADDED APPROACH

In addition to the scope of services outlined in the RFP and our approach in providing them we recommend engaging a non-profit developer-consultant to collaborate in the assessment of development potential of each site. We see the following benefits to the ARUSD:

- Expertise in the preparation of project proformas related to a variety of housing typologies.
- Expertise in program elements appropriate to specific locations in the community.
- Ability to provide resident and facilities management services.
- Tax credit and creative funding strategies.
- Knowledge in assembling and managing design and technical consultant teams for housing projects delivery.
- Community and political outreach experience.
- Coordination of cultural and community service associated with specific community needs.
- Phasing and logistics approaches.

Based on our experience in working with affordable, non-profit developers we recommend BRIDGE Housing Corporation for this role. We have included their company information for review in this proposal.



2.5.3.3. Financial Resources and Insurance Coverage

As a private corporation, HED does not typically disclose financial statements as part of a proposal document. We are willing to provide as a separate document if they remain confidential and are not released in the public domain.

For further information, reach out to:
Kevin J. Peterson, HED Corporate Finance Leader
kpeterson@hed.design | P: 248.262.1544

HED is in good standing and appropriately insured to pursue the work required in the RFQ/RFP and per state and local requirements.

Please see our attached Certification of Insurance for more details.

2.5.3.4. 5-Year Litigation History

Project: Carlyle Residences High-Rise Condominiums
Date of Claim: 10/4/2019
Name of Claim/Parties: The Carlyle Residences Owners Association -vs- El Ad Wilshire, LLC and Swinerton Builders
Court/Case No.: Los Angeles County Superior Court Case No. 19STCV35360

Description/Status: The complaint generally alleges "construction defects" exist in a Los Angeles high-rise luxury condominium tower completed and occupied approximately 10 years ago. HED was the Executive Architect for the project, Swinerton was the GC. HED was served with a cross-complaint, dated 2/13/2020, by Swinerton, naming HED and six other design professionals, trade subcontractors and suppliers as cross-defendants on a variety of legal theories. Neither plaintiff's complaint nor Swinerton's cross-complaint contained any factual details regarding building defects or deficiencies. **HED HAS BEEN DISMISSED FROM THIS MATTER.**

Affordable housing is the backbone of our communities ..Interfaith and HED have done an incredible job of bringing this building to life quickly, and we are grateful to have them as our partner helping to fulfill this critical community need."

– Toni Preckwinkle, President
Cook County Board of Commissioners

2.5.3.5 Letters of Reference or Testimonials

"With its 370 beds and complete on-site case management services for residents, Angeles House will provide homeless families (including 280 children) the opportunity to have satisfying, self-sufficient lives."

Kevin Dretzka | Board Secretary and Director
Union Rescue Mission

HED is easy to work with-team players-and responsive to our needs and concerns with solutions that are thoughtful, practical, and cost effective."

Kim McNeely | Bond Program Director
Livermore Valley Joint USD

The team of architects and consultants that HED has put together for our projects has been highly professional, knowledgeable of the tasks that need to be performed and attentive to timelines and schedules."

Lawrence A. Raffo | Superintendent (Retired)
Hillsborough City School District

The USC Village creates new residential colleges that immerse students in a stimulating, academically enriching environment and provides a home away from home that nourishes their intellectual, creative and personal growth"

Lloyd Silberstein | V.P. and Executive Director of Capital Construction and Facilities Management
University of Southern California

This LEED Gold certification for San Clemente Villages is a wonderful testament to UC Santa Barbara's commitment to sustainable design. Our goal was to create a housing facility for our graduate students that would be affordable, appealing, and environmentally sensitive, and would promote the values of our campus and community. Thanks to the contributions of our HED, faculty, staff, and students, our campus has become a 'living laboratory' for the research, teaching, and practice of environmental sustainability."

Henry T Yang | Chancellor
UC Santa Barbara

CERTIFICATE OF LIABILITY INSURANCE

DATE (MM/DD/YYYY): 9/23/2022

THIS CERTIFICATE IS ISSUED AS A MATTER OF INFORMATION ONLY AND CONFERS NO RIGHTS UPON THE CERTIFICATE HOLDER. THIS CERTIFICATE DOES NOT AFFIRMATIVELY OR NEGATIVELY AMEND, EXTEND OR ALTER THE COVERAGE AFFORDED BY THE POLICIES BELOW. THIS CERTIFICATE OF INSURANCE DOES NOT CONSTITUTE A CONTRACT BETWEEN THE ISSUING INSURER(S), AUTHORIZED REPRESENTATIVE OR PRODUCER, AND THE CERTIFICATE HOLDER.

IMPORTANT: If the certificate holder is an ADDITIONAL INSURED, the policy(ies) must be endorsed. If SUBROGATION IS WAIVED, subject to the terms and conditions of the policy, certain policies may require an endorsement. A statement on this certificate does not confer rights to the certificate holder in lieu of such endorsement(s).

PRODUCER
Professional Concepts Insurance Agency, Inc.
1127 South Old US Highway 23
Brighton MI 48114-9861

CONTACT NAME: certs@pciaonline.com
PHONE (A/C, No, Ext): (800) 969-4041 FAX (A/C, No): (800) 969-4081
E-MAIL ADDRESS: certs@pciaonline.com

INSURER(S) AFFORDING COVERAGE	NAIC #
INSURER A: Travelers Prop Casualty of America	25674
INSURER B: Travelers Indemnity Co	25658
INSURER C: XL Specialty Insurance Company	37885
INSURER D:	
INSURER E:	
INSURER F:	

INSURED
Harley Ellis Devereaux Corporation
417 MONTGOMERY ST
SAN FRANCISCO CA 94104-1129

COVERAGES **CERTIFICATE NUMBER: 22-23** **REVISION NUMBER:**

THIS IS TO CERTIFY THAT THE POLICIES OF INSURANCE LISTED BELOW HAVE BEEN ISSUED TO THE INSURED NAMED ABOVE FOR THE POLICY PERIOD INDICATED. NOTWITHSTANDING ANY REQUIREMENT, TERM OR CONDITION OF ANY CONTRACT OR OTHER DOCUMENT WITH RESPECT TO WHICH THIS CERTIFICATE MAY BE ISSUED OR MAY PERTAIN, THE INSURANCE AFFORDED BY THE POLICIES DESCRIBED HEREIN IS SUBJECT TO ALL THE TERMS, EXCLUSIONS AND CONDITIONS OF SUCH POLICIES. LIMITS SHOWN MAY HAVE BEEN REDUCED BY PAID CLAIMS.

INSR LTR	TYPE OF INSURANCE	ADDL INSD	SUBR WVD	POLICY NUMBER	POLICY EFF (MM/DD/YYYY)	POLICY EXP (MM/DD/YYYY)	LIMITS	
A	X COMMERCIAL GENERAL LIABILITY CLAIMS-MADE [X] OCCUR X Contractural Liability X X,C,U GEN'L AGGREGATE LIMIT APPLIES PER: POLICY [X] PRO-JECT LOC OTHER:			6602R16685ATIL22	10/1/2022	10/1/2023	EACH OCCURRENCE DAMAGE TO RENTED PREMISES (Ea occurrence) MED EXP (Any one person) PERSONAL & ADV INJURY GENERAL AGGREGATE PRODUCTS - COMP/OP AGG	$ 1,000,000 $ 1,000,000 $ 5,000 $ 1,000,000 $ 2,000,000 $ 2,000,000
B	AUTOMOBILE LIABILITY X ANY AUTO ALL OWNED AUTOS SCHEDULED AUTOS X HIRED AUTOS X NON-OWNED AUTOS			BA4R5523372247	10/1/2022	10/1/2023	COMBINED SINGLE LIMIT (Ea accident) BODILY INJURY (Per person) BODILY INJURY (Per accident) PROPERTY DAMAGE (Per accident)	$ 1,000,000 $ $ $
A	X UMBRELLA LIAB X OCCUR EXCESS LIAB CLAIMS-MADE DED X RETENTION $ 10,000			CUP7R0266562247	10/1/2022	10/1/2023	EACH OCCURRENCE AGGREGATE	$ 10,000,000 $ 10,000,000
A	WORKERS COMPENSATION AND EMPLOYERS' LIABILITY ANY PROPRIETOR/PARTNER/EXECUTIVE OFFICER/MEMBER EXCLUDED? (Mandatory in NH) Y/N [N] N/A If yes, describe under DESCRIPTION OF OPERATIONS below			UB4R5668882247	10/1/2022	10/1/2023	X PER STATUTE OTH-ER E.L. EACH ACCIDENT E.L. DISEASE - EA EMPLOYEE E.L. DISEASE - POLICY LIMIT	$ 1,000,000 $ 1,000,000 $ 1,000,000
C	Professional Liability			DPR5002900	10/1/2022	10/1/2023	Per Claim Aggregate	$ 5,000,000 $ 10,000,000

DESCRIPTION OF OPERATIONS / LOCATIONS / VEHICLES (ACORD 101, Additional Remarks Schedule, may be attached if more space is required)

CERTIFICATE HOLDER
FOR INFORMATIONAL PURPOSES ONLY

CANCELLATION
SHOULD ANY OF THE ABOVE DESCRIBED POLICIES BE CANCELLED BEFORE THE EXPIRATION DATE THEREOF, NOTICE WILL BE DELIVERED IN ACCORDANCE WITH THE POLICY PROVISIONS.

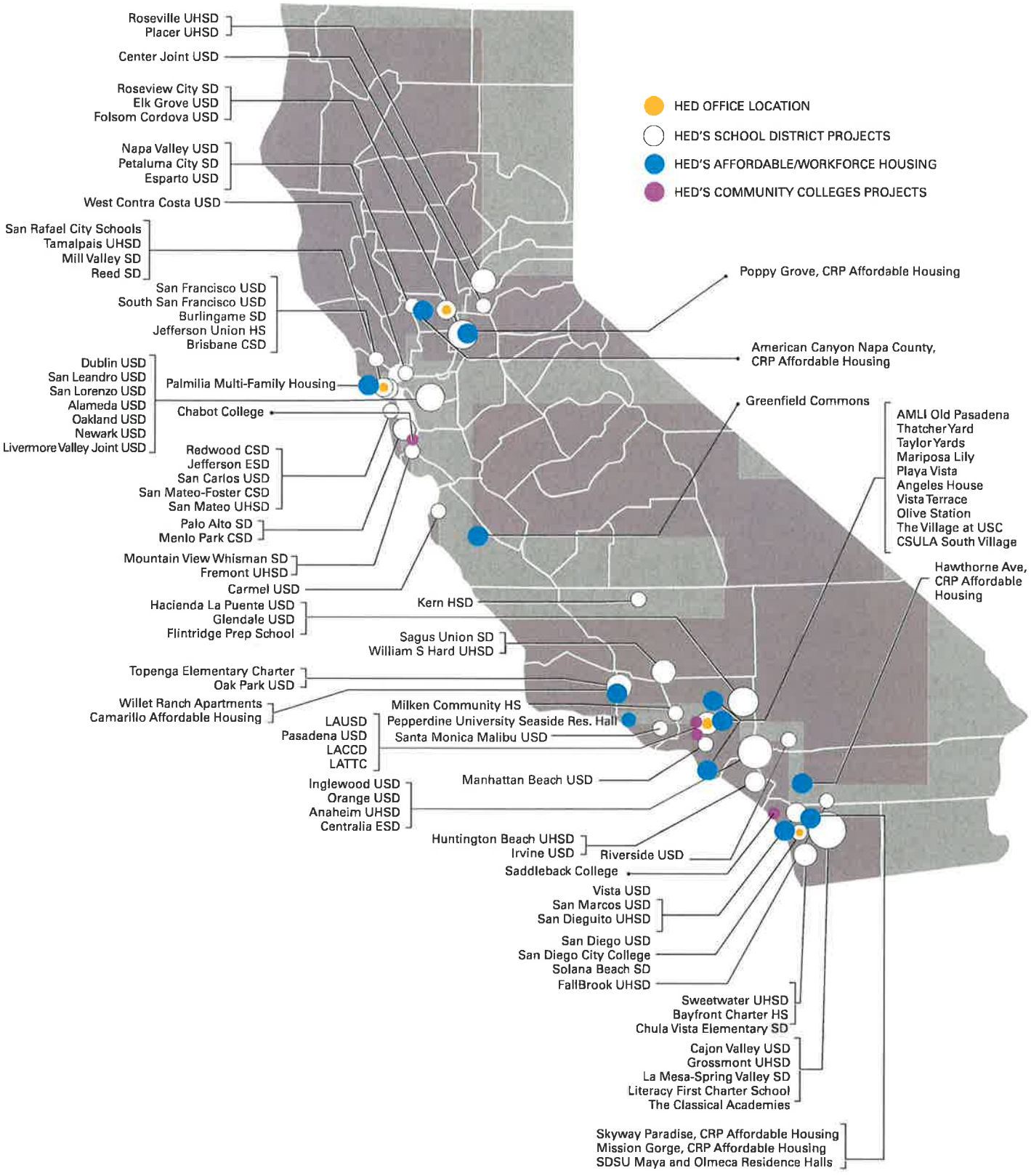
AUTHORIZED REPRESENTATIVE
Mike Cosgrove/SUNNY

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HED

2.5.4.1 | Prior Relevant Experience





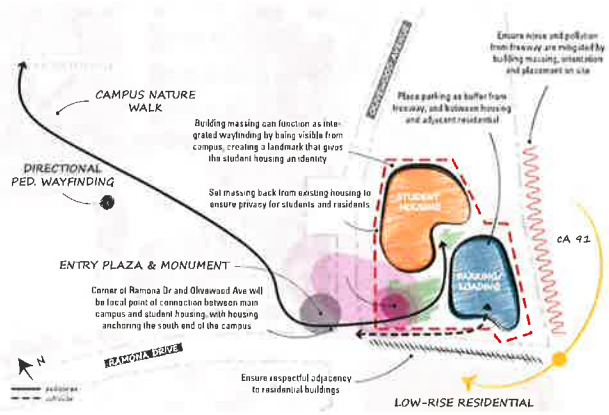
Riverside CCD

NORCO COLLEGE, STUDENT HOUSING PROGRAMMING STUDY, NORCO, CA

HED is currently providing a programming study for Riverside Community College District for on-campus housing possibilities for 100 student housing units at Norco College. In our collaboration with RCCD, HED met with campus leadership, staff, faculty, students, and the facilities group in multiple workshop sessions to complete programming and assessment for the project.

User Type | Student Housing
Project Type | Programming Study
Building Size | 100 units
Completion | Current

Reference | Hussain Agah
Associate Vice Chancellor, Facilities Planning & Development
T 951.222-8871
hussain.agah@rccd.edu



OPPORTUNITIES
- Campus gateway
- Integrated way-finding with iconic massing
- Campus visibility from 91

CONSTRAINTS
- Noise and pollution from 91
- Distance from Campus core
- Respect adjacency to residential neighbors

Riverside CCD

RIVERSIDE COLLEGE, STUDENT HOUSING PROGRAMMING STUDY, RIVERSIDE, CA

At Riverside College, HED studied the feasibility of providing 200 student housing units and how the project can integrate with student life on the campus and fulfill the Riverside Community College District's mission to provide affordable housing opportunities for their students. In addition, the project is intended to support the district's goal of expanding living and learning environments to enhance the collegiate experience.

User Type | Student Housing
Project Type | Programming Study
Building Size | 200 units
Completion | Current

Reference | Hussain Agah
Associate Vice Chancellor, Facilities Planning & Development
T 951.222-8871
hussain.agah@rccd.edu



Riverside CCD

MORENO VALLEY COLLEGE, STUDENT HOUSING PROGRAMMING STUDY, MORENO VALLEY, CA

Riverside Community College District's Moreno Valley College is part of the Riverside Community College District's program to study student housing options for its campuses. The studies at Moreno Valley College envision a 100 unit community where students live on campus while engaging in their studies. In addition, the housing project is intended to integrate into the college's Facilities Master Plan and existing campus context.

User Type | Student Housing
Project Type | Programming Study
Building Size | 100 units
Completion | Current

Reference | Hussain Agah
Associate Vice Chancellor, Facilities Planning & Development
T 951.222-8871
hussain.agah@rccd.edu





Palo Alo Unified School District

PALO ALTO HIGH SCHOOL MASTER PLAN, NEW FACILITIES, AND RENOVATIONS, PALO ALTO, CA

In 2008, HED was retained to master plan the Palo Alto High School campus and prepare an implementation plan for the $98 M allocated from their bond for growth. The master plan addressed the modernization of existing facilities as well as the addition of new buildings in the form of a two-story, 27-classroom science building, a 580-seat performing arts center, a 37,700 sf media arts center, and renovation of the campus' library to add accommodations for a guidance center. The design challenge was to take architectural cues from the community's Mediterranean revival architecture style and incorporate it into new, contemporary facilities. The implementation and phasing plan allowed multiple projects under construction and under design to happen concurrently. This approach successfully reduced the overall timeline of the implementation plan.

Project Type | Master Plan, New Construction and Renovations

Building Size | 600,000 SF

Completion | Ongoing

Construction Cost | $61.5 M

Team | Rob Filary (PIC - Modernization portion)

Reference | Robert Golton, CBO
Palo Alto USD
650.329.3980; rgolton@pausd.org

Additional Relevant Workforce Housing Projects



EAH Housing

GREENFIELD COMMONS, GREENFIELD, CA

Greenfield Commons is visualized as 3 clusters of low scale buildings organized around landscaped courtyards. 222 apartment homes are presented in multiple two-level buildings to create a neighborhood feel that is consistent with the rural nature of the site and the scale of the surrounding development. The density is transitional from the downtown center to the west and the single family development to the east. The unit mix provides a variety of one-, two- and three bedroom configurations to accommodate the local market. On-site management will be provided, including a two-bedroom manager's living unit. Close proximity to the Greenfield Union School District.

User Type | Income Qualified

Project Type | New Construction

Building Size | 249,650 GSF

Construction Cost | $167 M

Completion | 2024

Team | Otis Odell (PIC), Rick Castillo (Sector Leader), Christopher Coates (designer)



Brookfield Properties

PLAYA VISTA, LOS ANGELES, CA

The Playa Vista development provides homeownership opportunities for first-time buyers in the local workforce. Compact, efficient dwellings include designs for singles, couples, and new families, including units designed with interior flexibility to accommodate the changing needs of growing households. Outside, the architecture frames exterior courtyards and presents a confidently modern aesthetic. The configuration of the plan is designed to take maximum advantage of the views to Bluff Creek Park creating a strong connection to the site context. 125 members of LA's workforce are now be able to live closer to work—and to fully participate in the communities they serve and support. The units take full advantage of the development's expansive campus, including both Playa Vista and Argo Navis Elementary Schools, Animo W. School and Layola Marymont University.

User Type | Workforce Housing
Project Type | New Construction
Building Size | 138,000 SF; 125 Units
Construction Cost | $23 M
Completion | 2017 **Team |** Otis Odell (PIC)





Thomas Safran and Associates

THATCHER YARD AFFORDABLE HOUSING, SIC - MARINA DEL RAY, CA

Located in a popular neighborhood in Los Angeles, Thatcher Yard is an affordable housing development that transforms a former sanitation yard into high-quality housing for economically-challenged seniors, families, and individuals.

For Thatcher Yard, HED's team was charged with creating an affordable housing design that sits comfortably amidst the surrounding high-end and market-rate housing. To meet this challenge, we crafted an affordable housing product type that is not only sensitive to surrounding context as a whole, but actually responds to multiple adjacent housing types on specific sides of the development. The resulting design is a triumph of site and urban planning.

Upon completion, Thatcher Yard will provide 98 total units—98 new homes providing a sense of place, security, connection, and hope. Further more, Thatcher Yards in conveniently located with15 minutes or less of 20+ elementary, middle and high schools.

User Type | Income Qualified, Senior, and Permanent Supportive Housing
Project Type | New Construction
Building Size | 127,959 GSF; 98 Units
Construction Cost | $38 M **Team |** Otis Odell (PIC)

Section

6 Additional Data



USC | The Village Student Housing

Additional Select Relevant Project Awards

AMLI OLD PASADENA

- Los Angeles Business Journal Commercial Real Estate Awards – Silver Award, Mixed-Use / Retail (2022)

LATHROP AFFORDABLE HOUSING

- Chicago AIA Design Excellence Award
- ENR Midwest's 2020 Best Projects: Best Project, Residential/Hospitality
- 2020 Landmarks IL: Richard H. Driehaus Foundation Preservation Award for Rehabilitation
- 2021 Chicago Neighborhood Development Award: Richard H Driehaus Award for Design Excellence in Community Development

SANTA MONICA HS, DISCOVERY BUILDING

- 52nd Annual Los Angeles Architectural Awards, Los Angeles Business Council and Architectural Awards Jury, 2022
- West Side Urban Forum Design Award, 2022
- Best K-12 Education Project, ENR California, 2022
- Project Achievement Award, CMAA Southern California Chapter, 2022
- Juror's Choice, Association for Learning Environments (A4LE), Planning and Design Awards, 2022
- Green Technology: Green California Schools Facilities Leadership Award, 2021
- Southern California Development Forum Design Award for Un-Built /On the Boards /Under Construction Category, 2019
- Education Citation Award , AIA San Fernando Valley Chapter 2019

SANTA MONICA HS, EXPLORATION BUILDING AND GOLD GYMNASIUM

West Side Urban Forum Citation Award, 2021

MIRA COSTA HS MATH AND SCIENCE BUILDING

American School and University Citation Award, 2014

MANHATTAN BEACH LIBRARY *(LEFT)*

- Southern California Development Forum Design Award, 2018
- Best Public Project Silver, Commercial Real Estate Awards, LA Business Journal, 2018
- Best Project Award, Cultural/Worship, Engineering News Record (ENR), 2015
- 46th LA Architectural Awards, Civic Buildings Award of Excellence,Los Angeles Business Council, 2018

NOBEL LIBRARY AND ATHLETIC FIELD

Project of the Year, Parks, American Public Works Association (APWA), 2007

GROSSMONT UNION HSD

- El Capitan HS PE Complex, CMACN Profiles in Architecture Award, 2016
- Santana High School Career Technical Building, CASH Design Honor Award, 2010

SAPERSTIN MIDDLE SCHOOL

- Outstanding Architectural Design (Education), San Diego Business Journal, 2019
- Orchid Award, SD Orchids & Onions, 2018
- Council of Educational Facility Planners International (CEFPI) Project of Distinction, 2011
- Citation of Excellence Award, Learning by Design, 2005
- Oceanside HS Performing Arts Center

OAK PARK JOINT-USE LIBRARY

- Award of Excellence, Coalition for Adequate School Housing, 2004
- Citation of Excellence, Learning By Design, 2004

WEST BERKELEY BRANCH LIBRARY

- Golden Nugget Award, Net Zero Energy, 2015
- Design Awards, AIA East Bay, 2015
- Illuminating Engineering Society Award, 2015
- 11th Biennial Award Program, Berkeley Design Advocates (BDA), 2015

LAKE VIEW TERRACE BRANCH LIBRARY

- COTE Top 10 Green Projects Award, 2004
- Savings By Design Award, AIA CA Council, 2004
- Excellence in Design Award, Environmental Design and Construction, 2004
- Honor Award, Concrete Masonry Association of California and Nevada, 2004
- Sustainable Design Honor Award, Concrete Masonry Association of CA & NV, 2004

SOLANA RANCH ELEMENTARY SCHOOL

- Award, Early Childhood/Elementary School, Learning By Design, 2016
- Leadership Award, Green Building, Green Technology Magazine, 2016
- Project of the Year, SMPS San Diego, 2015

SANTA ANA COLLEGE, CHILD DEVELOPMENT CENTER

- Architectural Portfolio Award, American School and University, 2012
- Association of Community Colleges, Merit Award, 2005

FAMILIES FORWARD LEARNING CENTER *(Formerly Mother's Club Family Learning Center)*

- Citation Award, AIA Committee on Architecture for Education Awards, 2011
- Citation Award, Council of Educational Facility Planners International (CEFPI), 2011
- Citation Award, Learning Places/Learning Spaces, AASA, AIA, CEFFPI, 2009
- Energy Efficiency Award Winners, Best Overall, 6th Annual Flex Your Power, 2008
- Excellence Award, Learning By Design, 2008
- Merit Award, Design Share Awards, AIA Pasadena and Foothill, 2008
- Merit Award, Design Share Awards, 2008
- Citation, The American Institute of Architects California Council (AIACC), 2008
- Honor Award, Pasadena Beautification Foundation, 2008
- Cornerstone Concrete Excellence Award, 2008

We are Sustainability Champions

Sustainable Design Highlights

9.2M SF
LEED CERTIFIED

93
LEED CERTIFIED PROJECTS

30%
OF STAFF ARE SUSTAINABILITY ACCREDITED

AIA 2030
COMMITMENT FOR ALL NEW PROJECTS TO BE CARBON NEUTRAL BY 2030

200+
DESIGN AWARDS
(INCLUDING 2 AIA COTE TOP 10 AWARDS)

TOP 100
GREEN DESIGN FIRM BY ENR

I am very pleased that the USGBC has acknowledged and confirmed all of our efforts to create a **sustainable, architecturally appropriate, affordable** student housing complex for UC Santa Barbara with the designation of LEED Gold."

- Marc Fisher
Sr. Associate Vice Chancellor
UC Santa Barbara

Our team's knowledge and experience with high performing building projects is just one part of a much larger story about our values and culture. HED's firmwide mission is to have a positive impact for our clients, the community, and the world through design excellence. We define that as a solution built from thoughtful decision-making that creates measurable, real world positive impact. Sustainability is inseparable from design excellence, and significantly benefits what we refer to as "the triple bottom line" - the social, economic, and environmental impacts of a project.

We advocate for sustainable solutions wherever possible regardless of certification goals because we genuinely believe that they create better facilities and offer improved outcomes for their occupants. The positive impact they create includes risk mitigation, future preparedness, adaptability, preserving and supporting the health and well-being of the building occupants, as well as the health and wellbeing of everyone involved in the life cycle of the building materials from cradle to grave, as well as demonstrating social and economic stewardship, leadership, innovation, and advocacy.

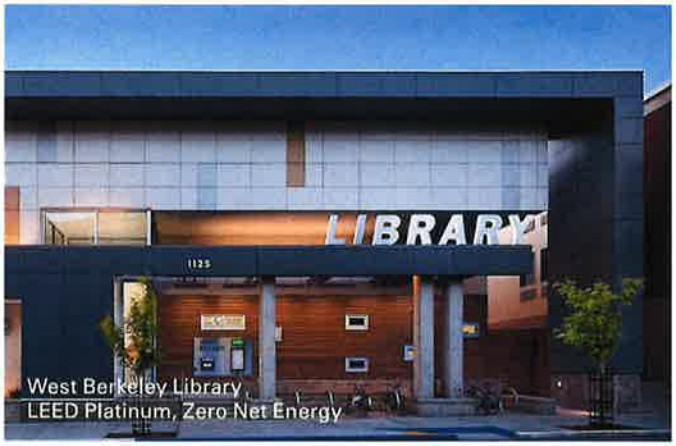
Successfully executing high performing projects requires an integrated approach. Designs need to be resource efficient with the goal of maximizing effectiveness of building systems and minimizing both initial and operating costs and negative environmental impact. Our projects start with a series of integrated stakeholder workshops to facilitate creative thinking, the cross-pollination of ideas, and identification of sustainable design goals focused on ten principles: integration, community, ecology, water, economy, energy, well-being, resources, change, and discovery. These paradigms, taken from the AIA Framework for Design Excellence, provide a comprehensive and analytical process to incorporating sustainability. As a method of evaluating a project's success, optional certification programs such as LEED, WELL, Living Building Challenge, and others can provide a benchmarking tool that adds third-party rigor and can serve as a marketing tool to confirm a project's high-performing status.

DESIGN FOR WELL-BEING

Designing to support the health and well-being of all building occupants is of utmost importance. Growing evidence demonstrates that design can have a significant impact on both personal and public health. More and more studies show the physical, mental, and emotional benefits of indoor environmental quality. Measurable benefits include reduced absences,



Manhattan Beach Branch Library
LEED Gold



West Berkeley Library
LEED Platinum, Zero Net Energy



UC Santa Barbara, San Clemente
Student Housing | LEED Gold

improved health, increases in both productivity and positive attitudes. Strategies such as universal design, encouragement of movement, and incorporating natural materials and motifs (biophilia) can lower stress and increase focus. Human biology biases us toward the need for change, the ability to act on our environment with visible results, and the presence of meaningful stimuli. Stagnant, inert environments can cause chronic stress whereas biophilic proportions, patterns, and colors of interior space have been shown to boost creativity and motivation and lower stress. Designing buildings to be flooded with controlled daylight and tuned to circadian rhythms in the evening is also important. Proper exposure to daylight combined with positive views of the outdoors can elevate concentrations of serotonin, lower stress, fatigue, and headaches, improve occupant sleep patterns, and increase staff satisfaction. Finally, the value of good indoor air quality cannot be underestimated. Fresher air indoors can mitigate fatigue and reduce the incidence of respiratory ailments such as asthma and allergies.

There are several rating systems that can help guide the design for occupant well-being. Two such tools are Fitwell and the WELL Building Standard, which are performance-based systems with a mission to improve human health and wellbeing through the building environment. HED has experience with these systems across various projects. We are also a signatory to the Living Product 50 Materials Pledge declaring our intent to help safeguard the health of people and communities across the material supply chain by avoiding the specification of products containing chemicals of known concern. Coupled with our HED Material Health Guidelines, that pledge helps us design to avoid use of building materials that can have adverse health effects.

Select Student Housing Portfolio

CSU Los Angeles
Student Housing East

Location | Los Angeles, CA
Construction Cost | $167 M
Project Size | 410,000 SF
Completion | 2021



CSU Fullerton
Student Housing Concept Study Design Competition

Location | Fullerton, CA
Construction Cost | N/A
Project Size | 160,000 SF
Completion | 2019



UC Davis
Tercero Housing Phase III

Location | Davis, CA
Construction Cost | $109 MA
Project Size | 495,000 SF
Completion | 2012



SDSU
Confidential Housing Study

Location | San Diego, CA
Construction Cost | $240 M
Project Size | 400,000 SF
Completion | N/A



Pepperdine University
Seaside Residence Hall

Location | Malibu, CA
Construction Cost | $70 M
Project Size | 118,000 SF
Completion | 2018



SDSU
Maya and Olmeca Residences

Location | San Diego, CA
Construction Cost | $20 M
Project Size | 78,000 SF
Completion | 2019



UC Santa Barbara
San Clemente Graduate Student Housing

Location | Santa Barbara, CA
Construction Cost | $97.9 M
Project Size | 382,000 SF
Completion | 2008



UC Santa Cruz
Student Housing West

Location | Santa Cruz, CA
Construction Cost | $450 MA
Project Size | 1,007,454 SF
Completion | 2022



University of Iowa
Elizabeth Catlett Residence Hall

Location | Iowa City, IA
Construction Cost | $78 M
Project Size | 325,000 SF
Completion | 2017



USC
USC Village

Location | Los Angeles, CA
Construction Cost | $550 M
Project Size | 1.2M SF
Completion | 2017



HED

Select Affordable/Workforce Housing Portfolio

McCormack Baron Salazar, Inc.
Taylor Yards / Parque Vista

User Type | Affordable Housing Infi II Development Designed to Fit Existing Context

Location | Los Angeles, CA

Building Size | 44,087 SF; 42 units

Construction Cost | $9 M



Union Rescue Mission
Angeles House

Location | Los Angeles, CA

User Type | Permanent Supportive Housing

Building Size | 74,866 GSF; 86 units

Construction Cost | $38 M



Mariposa Lily
West Hollywood Community Housing Corporation

User Type | Affordable and Permanent Supportive Housing

Location | Los Angeles, CA

Building Size | 45,000 SF; 41 units

Construction Cost | $15 M



Housing Authority of the City of San Buenaventura
Willet Ranch Apartments

Location | Ventura, CA

User Type | Senior Affordable

Building Size | 44,800 SF; 50 units

Construction Cost | $16.5 M



Palmilia by the Bay
Pebble Creek Development

Location | San Francisco, CA

Project Type | New Construction, Type I-A, II-A

Building Size | 502,135 GSF; 225 units

Construction Cost | $140 M



CRP Affordable Housing
American Canyon Napa County

Location | American Canyon, CA

User Type | Affordable

Building Size | 151,589 SF; 66 units

Construction Cost | $39.1 M



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Section

7 Firm's Current Commitments



Brookfield Properties | Playa Vista Housing

Firm's Current Commitments

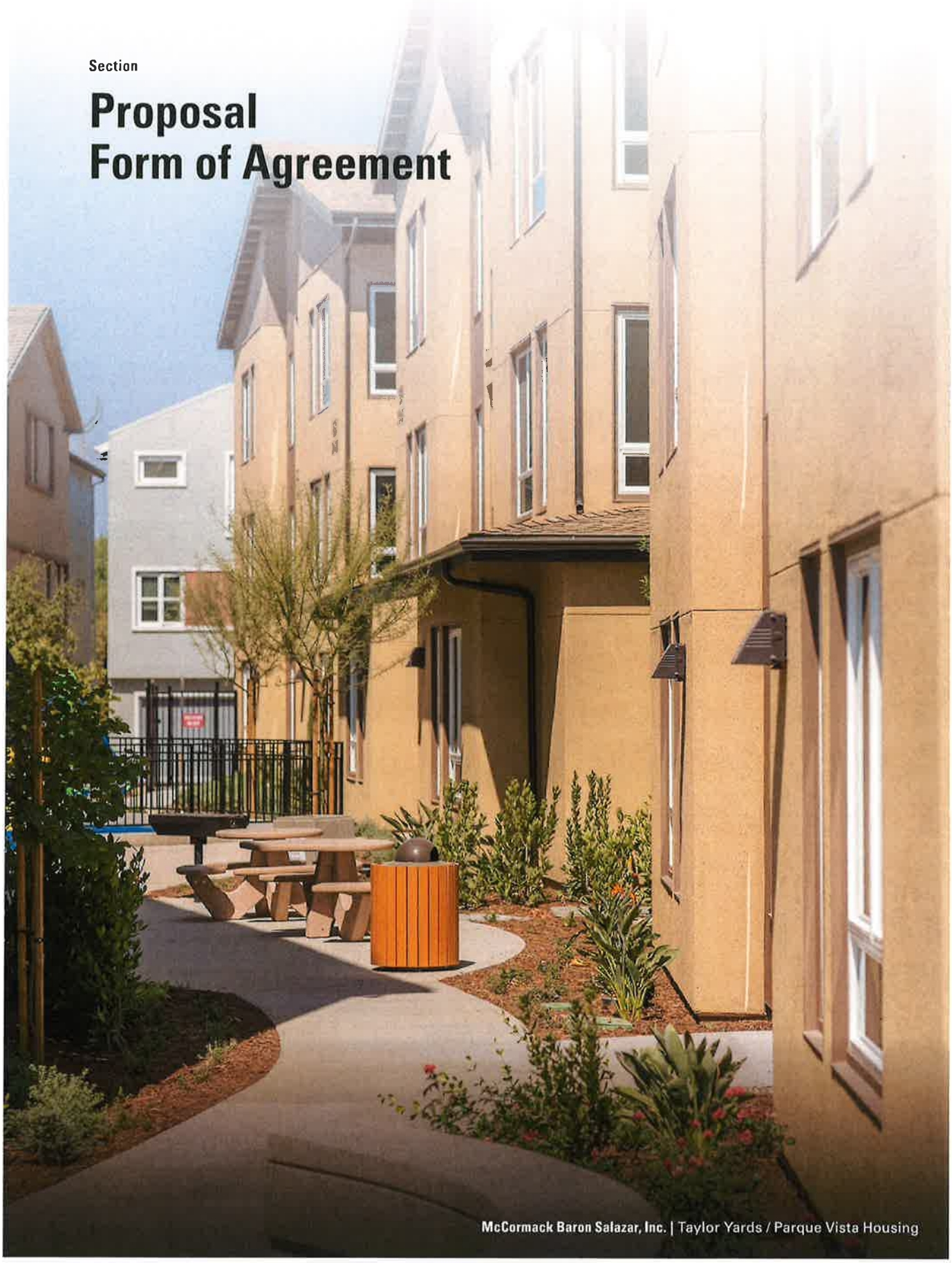
With over 400 employees in 8 locations HED leads hundreds of millions of dollars in projects every year. In addition to our staff in local offices near you, we can support your project with a deep bench of technical experts from across the California offices. The team identified in this proposal were selected for their experience and availability to commit to your project. They will be dedicated to the success of this project and will perform the work necessary to meet the demands of the schedule and work plan put forth in our proposal.

CURRENT COMMITMENTS	
NAME, ROLE	**CURRENT PROJECT (S)**
Rob Filary | Principal in Charge	• San Mateo-Foster City SD, Bowditch MS Campus Modernization • Livermore Valley Joint USD, Livermore HS Classroom and Student Union Feasibility Study • East Side Union High SD, Yerba Buena Performing Fine Arts Classrooms
Mary Ruppenthal | Pre K-12 Sector Leader	• Menlo Park City SD, Encinal ES and Oak Knoll ES Transitional Kindergarten Planning and Modernization • San Mateo UHSD, Aragon and Mills HS Site Improvements
Leah Marthinsen | Project Manager	• East Side Union High SD, Yerba Buena Performing Fine Arts Classrooms • Livermore Valley Joint USD, Livermore HS Classroom and Student Union Feasibility Study • Menlo Park City SD, Encinal ES and Oak Knoll ES Transitional Kindergarten Planning and Modernization
Otis Odell | Housing Sector Specialist	• Poppy Grove Affordable Housing Development, Elk Grove, CA • American Canyon Affordable Housing Napa County
Rick Castillo | Housing Sector Specialist	• Palmilia Mixed-Income Housing • Inspire Echo Park Multifamily
Erin Pleticha | Project Designer, Housing Specialist	• Palmilia Mixed-Income Housing • Thatcher Yard Affordable Housing
Christopher Coates | Project Designer	• Poppy Grove Affordable Housing Development, Elk Grove, CA • American Canyon Affordable Housing Napa County

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Section

Proposal
Form of Agreement



McCormack Baron Salazar, Inc. | Taylor Yards / Parque Vista Housing

3.1 COMPENSATION

ARUSD Feasibility Studies	*At the time of this proposal, the number of sites that will require feasibility studies by ARUSD is undetermined. As outlined in our fee table, HED proposes the services in Stage-2 through 4 and Community Outreach meetings on a per site basis. Potential adjustment to this fee table are indicated in footnotes.*	
Stage	**Fee Type**	**Fee Totals**
Stage-1: Research and Analysis:	Fixed Fee for All School Sites	$ 87,800
Stage-2A: Feasibility Study:	Fixed Fee per School Site	$ 12,000
Stage-2A: Estimate of Construction Cost	Fixed Fee per School Site	$ 6,200
Stage-2B: Feasibility Study:	Optional as Requested by ARUSD 1	*To be Determined*
Stage-2B: Estimate of Construction Cost	Optional as Requested by ARUSD 1	*To be Determined*
Stage-3: Summary of Findings Report:	Fixed Fee per School Site 2	$ 5,200
Stage-4: Presentation:	Fixed Fee per School Site 3	$ 2,500
Community Meetings and Outreach	Fixed Fee per School Site 4	$ 3,100
	Grand Total	**$ 116,800**

Feasibility Studies and Cost Estimates for additional school sites identified for Stage-2B are on a per site basis. If ARUSD requests multiple feasibility studies for school sites during this stage, HED will propose a discounted fee based on efficiencies gained for the study of multiple sites.

Stage-3 Summary of Findings on a per site basis. If multiple feasibility studies occur in Stages-2A and 2B at the direction of ARUSD, HED to propose a discounted fee based on efficiencies gained for the report preparation of multiple sites into a single report.

Presentation to the ARUSD Board indicated in a per site basis. If multiple site study and findings occur at a single ARUSD Board presentation, HED will propose a discounted fee based on efficiencies gained for the presentation of multiple sites at one ARUSD Board meeting.

Community Outreach meetings indicated in a per site basis. Fee includes participation in meetings by HED staff and preparation of collateral materials for meeting presentations. If multiple sites are presented on a single Community Outreach meeting, HED will propose a discounted fee based on efficiencies gained for the presentation of multiple sites at one ARUSD Board meeting.

HED mark-up on retained consultant services is 15%

ARUSD Feasibility Studies		
Stage	**Staffing Expectations:**	**Approximate % Hours per Stage**
Stage-1: Research and Analysis:	Principal	15%
	Project Manager	8%
	Project Architect / Designer	77%
	Design Support Staff	
Stage-2A: Feasibility Study:	Principal	7%
	Project Manager	4%
	Project Architect / Designer	89%
	Design Support Staff	
	Cost Estimating Consultant	30%
Stage-2B: Feasibility Study:	Principal	TBD
	Project Manager	
	Project Architect / Designer	
	Design Support Staff	
	Cost Estimating Consultant	
Stage-3: Summary of Findings Report:	Principal	10%
	Project Manager	5%
	Project Architect / Designer	85%
	Design Support Staff	
Stage-4: Presentation:	Principal	50%
	Project Manager	0%
	Project Architect / Designer	50%
	Design Support Staff	
Community Meetings and Outreach	Principal	50%
	Project Manager	5%
	Project Architect / Designer	45%
	Design Support Staff	

Menu of Additional Services:

- Services beyond those defined in this proposal.
- Fees for Design and engineering consultants not identified in proposal
- Site Surveys
- Branding Services
- Demolition documentation
- Measured drawings or existing facilities surveys
- Environmental Design (LEED) rating from the U.S. Green Building Council (USGBC) or any other sustainability design program.
- Photo-realistic renderings or physical models beyond those identified in scope of work.
- Marketing drawings, including illustrative floor plans or graphics
- Photography or brochure printing
- Additional meetings beyond the number of meetings identified
- Preparation documents for governmental agency entitlements (City of San Jose)
- Production of drawings normally included in the work of a consulting landscape architect, civil engineer, structural, mechanical, electrical and plumbing engineer, Interior designer or similar consultant

3.1.2 Professional Fees

HED 2023 BILLING RATES	
CLASSIFICATION	**RATE**
Principal-in-Charge	$202 - $295
Design / Technical / Interiors / Engineering Leader	$202 - $290
Senior Project Manager	$190 - $285
Senior Project Architect / Engineer	$190 - $275
Project Manager	$160 - $250
Project Architect / Engineer / Planner / Designer	$132 - $225
Interior Designer	$160 - $200
Job Captain / Project Coordinator / Design	$111 - $180
Design and Technology Support	$111 - $140
Administration	$75 - $125

Contract Modifications

We have the following suggested revisions (illustrated in red below) to the Contract based on input from our insurance provider which we are open to discussing.

8. Standard of Care.
8.1 Consultant represents that Consultant has a qualifications and ability to perform the services in a professional manner, without the advice, control, or supervision of District. Consultant's services will be performed, findings obtained, reports and recommendations prepared in accordance with ~~generally and currently accepted principles and practices of its profession~~ **that degree of care and skill ordinarily exercised by members of the same profession currently practicing under similar circumstances at the same time and in the same or similar locality** for services to California school districts. Consultants services will be performed with due care and in accordance with applicable law, code, rule, regulation and/or ordinance.

10. Work Product. Consultant understands and agrees that all matters produced under this Agreement shall become the property of District **and Consultant** and cannot be used without District's express written permission. District shall have all right, title and interest in said matters, including the right to secure and maintain the copyright, trademark and/or patent of said matter in the name of the District. **Any additional changes or modifications to the Work Product shall likewise become the sole property of District and Architect. Any modification to, or reuse of, the Work Product, other than in connection with the Project, by District without the written consent of Architect shall be at the sole risk of District and District shall indemnify and defend Architect for any third party actions that may result therefrom.**

11.1. For Convenience by District. District may, at any time, with or without reason, terminate this Agreement and compensate Consultant only for services ~~satisfactorily~~ rendered to the date of termination. Written notice by District shall be sufficient to stop further performance of services by Consultant. Notice shall be deemed given when received by the Consultant or no later than three days after the day of mailing, whichever is sooner.

Either party may terminate this Agreement upon not less than seven days' written notice should the other party fail substantially to perform in accordance with the terms of this Agreement through no fault of the party initiating the termination.
If the District fails to make payments to the Architect in accordance with this Agreement, such failure shall be considered substantial nonperformance and cause for termination or, at the Architect's option, cause for suspension of performance of services under this Agreement. If the Architect elects to suspend services, the Architect shall give seven days' written notice to the District before suspending services. In the event of a suspension of services, the Architect shall have no liability to the District for delay or damage caused the District because of such suspension of services. Before resuming services, the Architect shall be paid all sums due prior to suspension and any expenses.

12. Indemnification. To the first furthest extent permitted by California law, Consultant shall indemnify, and hold harmless the District, its agents, representatives, officers, consultants, employees, trustees, and volunteers ("the Indemnified Parties") from any and all claims, demands, causes of action, costs, expenses, liability, loss, damage or injury of any kind, in law or equity, including without limitation the payment of all consequential damages ("Claim") arising out of, pertaining to or relating to, in whole part, the negligence, recklessness, **negligent** errors or omissions, or willful misconduct of Consultant, its officials, officers, employees, subcontractors, consultants, or agents directly or indirectly arising out of, connected with, or resulting from the performance of the services in conjunction with this Agreement. Consultant shall, to the furthest extent permitted by California law, defend the Indemnified Parties at Consultant's own expense, from any and all Claim(s) and allegations relating thereto with council approval by District where such approval is not the to be unreasonably withheld. **In no event shall the costs to defend charged to the Consultant exceed its percentage of fault. The duties described herein shall be subject to and construed in accordance with Cal. Civ. Code Section 2782.8, which is deemed incorporated by reference herein.**

19. Safety and Security. ~~**Consultant is responsible for maintaining safety and the performance of this agreement.**~~ **Consultant shall assume responsibility for and comply with owner security, safety, access, noticed and operational requirements. Consultant shall be responsible four and shall ensure compliance with same by anyone directly or indirectly employed by them, or anyone who's acts they may be liable.** Consultant shall be responsible to ascertain from the district the rules and regulations pertaining to safety and security when present on school grounds, particularly when children are present.

~~**20. Provisions Required By Law Deemed Inserted.** Each and every provision of law and clause required by law to be inserted in this agreement shall be deemed to be inserted herein and this Agreement shall be read and enforced as though it were included therein. [Deleted due to scope being inordinately broad]~~

~~**25. Limitation of district liability.**~~ Other than as provided in this Agreement, District's financial obligations under this Agreement shall be limited to the payment of the compensation provided in this Agreement **including any mutually agreed upon changes.** Notwithstanding any other provision of this agreement, in no event, shall District be liable, regardless of whether any claim is based on contract or tort, for any special, consequential, indirect or incidental damages, including, but not limited to, lost profits or revenue, arising out of or in connection with this agreement for the services provided performed in connection with this Agreement.

ALUM ROCK
UNION ELEMENTARY SCHOOL DISTRICT
2930 Gay Avenue, San José, CA 95127 · Phone: 408-928-6800 · Fax: 408-928-6416 · www.arusd.org

ADDENDUM 1 FOR
RFQ/RFP No. 2223-Bonds25

Development of Feasibility Study Regarding Workforce Housing

SEE CHANGES TO RFQ SCHEDULE:

Listed below is the "Tentative Timeline" which outlines pertinent dates of which firms responding to this solicitation should make themselves aware. See date change to **"Responses to Questions/Clarifications"**.

The District reserves the right to change the dates on the schedule without prior notice.

1.4. RFQ Schedule. District reserves the right to extend schedule dates by written addenda.

EVENT	TIME, DATE
Deadline for Written Questions Regarding RFQ/RFP	**4:00 P.M., Tuesday, January 10, 2023**
Deadline District's Response to Written Questions Timely Submitted. **Responses Posted on District website via Addenda.**	~~**4:00 P.M., Thursday, January 12, 2023**~~ **New Date: Friday, January 13, 2023**
Proposals Due	~~**4:00 P.M., Tuesday, January 17, 2023**~~ **New Date: Wednesday, January 18, 2023**
Interviews	**TBD – Selected firms will be contacted with a date**
Selection of Firm	**TBD**

Please submit a signed copy of this addendum with your RFQ/P response.

Company Name: **HED**

Signature: _____

Print Name: **ROB FILARY AIA** Date: **JANUARY 16, 2023**

Hilaria Bauer, Ph.D., Superintendent

Board of Trustees: Minh Pham, President · Corina Herrera-Loera, Vice-President
Andrés Quintero, Clerk · Ernesto Bejarano, Member · Linda Chavez, Member

ALUM ROCK
UNION ELEMENTARY SCHOOL DISTRICT
2930 Gay Avenue, San José, CA 95127 · Phone: 408-928-6800 · Fax: 408-928-6416 · www.arusd.org

ADDENDUM #2 FOR
RFQ/RFP No. 2223-Bonds25

Development of Feasibility Study Regarding Workforce Housing

Below are responses to questions presented in reference to the above RFQ/RFP.

Q & A

Q: Will the successful proposer be precluded from participating in any follow-on work for the Workforce Housing Project?

A: No.

Q: Has the District identified the potential real property sites from all existing District properties? If so, which sites have been identified?

A: No.

Q: If awarded the feasibility studies, would we be precluded from future housing work for Alum Rock Union School District?

A: No.

Q: Section 2.5.4.1. indicates K-12 and community college districts. Can we include Higher Ed relevant housing projects?

A: Please exclude Higher Ed.

Q. How is this project being funded and financed to maintain affordability?

A: GO Bonds.

Q. Does the District have current topographic and underground utility survey information available for each real property site?

A: No.

Q. Given that a hard copy is required and time is needed to print, and would it be possible to have additional time between RFI answers on the 12th and the RFQ due date of the 15th?

A: See updated timelines on the District's website.

Q. Is the District considering adaptive reuse of existing properties for housing use?

A: The District is open to this idea.

Please submit a signed copy of this addendum with your RFQ/P response.

Company Name: **HED**

Signature: _____

Print Name: **ROB FILARY AIA** Date: **JANUARY 16, 2023**

Hilaria Bauer, Ph.D., Superintendent

Board of Trustees: Minh Pham, President · Corina Herrera-Loera, Vice-President
Andrés Quintero, Clerk · Ernesto Bejarano, Member · Linda Chavez, Member

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WWW.HED.DESIGN

Rob Filary AIA
Principal in Charge
rfilary@hed.design
415.510.6691

417 Montgomery St., Suite 400
San Francisco, CA
94104

HED

ALUM ROCK UNION ELEMENTARY SCHOOL DISTRICT
2930 Gay Avenue
San José, CA 95127

2.02

Office of Superintendent of Schools

ITEM REQUIRING ATTENTION – BOARD OF TRUSTEES

Board of Trustees: Date: March 24, 2023

To the Superintendent of Schools

Subject: **Approve Transportation Plan for Fiscal Year 2022-2023**

Staff Analysis: Starting in Fiscal Year 2022-2023, Education Code 39800.1 requires the Governing Board of a school district receiving transportation funding under the LCFF to adopt a Transportation Plan on or before April 1, each year.

Recommendation: Staff recommends the Board of Trustees approve the Transportation Plan for Fiscal Years 2022-2023 and 2023-2024 as presented.

Submitted by: Kolvira Chheng Title: Assistant Superintendent, Business Services

To the Board of Trustees:

Meeting: March 30, 2023
Special Board Meeting

Recommended Approval

2.02
Agenda Placement

Hilaria Bauer, Ph.D., Superintendent

DISPOSITION BY BOARD OF TRUSTEES

Motion by: _____ Seconded by: _____

Approved _____ Not Approved _____ Tabled _____

Alum Rock Union Elementary School District
Transportation Plan
2022-23

The first year's plan due in April 2023 is intended to address both the current transportation program in 2022-23 fiscal/school year and the plan describing the prioritized transportation services it will offer to its identified pupils in the 2023-24 fiscal/school year. The requirement to have plan addressing two years would just a one-time nuance and future year plans would address updates to and primarily about the following fiscal/school year.

Transportation Services:

1. Enter description of transportation services offered to pupils, and how it will prioritize planned transportation services for pupils in transitional kindergarten, kindergarten, and any of grades 1 - 6 inclusive and pupils who are low income. Plan may provide for the LEA to partner with municipally owned transit system to provide services to middle and high school students. An LEA may provide no-cost transit passes to students.

The Alum Rock Union Elementary School District (ARUSD) provides curb to curb transportation services for special needs students having transportation services in their Individualized Education Plan (IEP) and students who attend non-public school programs. The District currently transports approximately 250 students with special needs and 2 McKinney Vento students. The transportation department runs 23 routes and 65 individual mid-day runs. It is staffed with 25 drivers, 2 mechanics, 1 lead dispatcher, 2 dispatchers and 1 support staff. There are currently 26 certified vehicles in operations. Additionally, the District provides transportation services for students that participate in field trips and extra-curricular activities such as sporting and music. Students living outside the walking boundaries of 1.5 miles radius for TK-5 and 3.5 mile radius for 6-8 will be evaluated for free transportation services from and to the nearest designated bus stop to home address. Low income students will be evaluated for free transportation services from and to the nearest designated bus stop to home address.

2. Enter description of LEA's transportation services that would be accessible to pupils with disabilities, and homeless children and youth.

Special needs students having transportaion services in their IEP receive curb to curb transportation services. McKinney Vento and Foster youth will receive free transportation by ARUSD in accordance with AR 3541.

3. Enter description of how unduplicated pupils, would be able to access available home-to-school transportation at no-cost to the pupils.

Students would register in transportation routing program and be evaluated for services by the Transportation Department in accordance with Board Policy and Board Administrative Regulation.

Consultations:

Enter description of the <u>required</u> plan consultation with classified staff, teachers, school administrators, regional local transit authorities, local air pollution control districts and air quality management districts, parents, pupils and other stakeholders.

The District followed the LCAP process by soliciting input and feedback from stakeholders at the LCAP community forums. The SCCOE facilitated in getting consultation with the Santa Clara Valley Authority (VTA) and Bay Area Quality Management District (BAAQMD) on behalf of school districts in Santa Clara County.

Revenue Calculation	
Total 2021-22 Transportation Expenses (Function 3600)	3,513,144.89
Less Capital Outlay (object 6XXX, Function 3600)	627,866.52
Less Nonagency Expenditures (Goal 7110,7150, Function 3600)	-
Estimated 60% Reimbursement	1,731,167.02
Less 2021-22 Transportation add-on (from LCFF Calculator)	1,442,379.00
Total Revenue (Object 8590, Resource 0000)	288,788.02
Expenditures and Other Financing Uses	
2000-2999 - Classified Salaries	1,553,309.24
3000-3999 - Employee Benefits	986,113.80
4000-4999 - Books and Supplies	199,367.89
5000-5999 - Services and other Operating Expenditures	146,487.44
6000-6999 - Capital Outlay	627,866.52
7000-7999 - Other Outgo	-
Total Expenditures	**3,513,144.89**

Board Approval Date: *March 30,2023*

The Transportation plan and revenue calculations were developed in accordance with Education Code Sections 39800.1 and 41850.1.

BALANCE (Total Available minus Total Expenditures and Other Financing Uses) **(3,224,356.87)**

Alum Rock Union Elementary School District
Transportation Plan
2023-24

The first year's plan due in April 2023 is intended to address both the current transportation program in 2022-23 fiscal/school year and the plan describing the prioritized transportation services it will offer to its identified pupils in the 2023-24 fiscal/school year. The requirement to have plan addressing two years would just a one-time nuance and future year plans would address updates to and primarily about the following fiscal/school year.

Transportation Services:

1. Enter description of transportation services offered to pupils, and how it will prioritize planned transportation services for pupils in transitional kindergarten, kindergarten, and any of grades 1 - 6 inclusive and pupils who are low income. Plan may provide for the LEA to partner with municipally owned transit system to provide services to middle and high school students. An LEA may provide no-cost transit passes to students.

ARUSD will continue to offer transportation in accordance with Board Policy and Board Administrative Regulation.

2. Enter description of LEA's transportation services that would be accessible to pupils with disabilities, and homeless children and youth.

Special needs students having transportaion services in their IEP receive curb to curb transportation services. McKinney Vento and Foster youth will receive free transportation by ARUSD in accordance with AR 3541.

3. Enter description of how unduplicated pupils, would be able to access available home-to-school transportation at no-cost to the pupils.

Students would register in transportation routing program and be evaluated for services by the Transportation Department in accordance with Board Policy and Board Administrative Regulation.

Consultations:

Enter description of the <u>required</u> plan consultation with classified staff, teachers, school administrators, regional local transit authorities, local air pollution control districts and air quality management districts, parents, pupils and other stakeholders.

The District followed the LCAP process by soliciting input and feedback from stakeholders at the LCAP community forums. The SCCOE facilitated in getting consultation with the Santa Clara Valley Authority (VTA) and Bay Area Quality Management District (BAAQMD) on behalf of school districts in Santa Clara County.

Revenue Calculation	
Total 2022-23 Transportation Expenses (Function 3600)	3,578,982.19
Less Capital Outlay (object 6XXX, Function 3600)	107,870.96
Less Nonagency Expenditures (Goal 7110,7150, Function 3600)	-
Estimated 60% Reimbursement	2,082,666.74
Less 2022-23 Transportation add-on (from LCFF Calculator)	1,562,096.46
Total Revenue (Object 8590, Resource 0000)	520,570.28
Expenditures and Other Financing Uses	
2000-2999 - Classified Salaries	1,771,797.97
3000-3999 - Employee Benefits	1,154,695.50
4000-4999 - Books and Supplies	323,913.11
5000-5999 - Services and other Operating Expenditures	220,704.65
6000-6999 - Capital Outlay	107,870.96
7000-7999 - Other Outgo	-
Total Expenditures	**3,578,982.19**

Board Approval Date: *March 30.2023*

The Transportation plan and revenue calculations were developed in accordance with Education Code Sections 39800.1 and 41850.1.

BALANCE (Total Available minus Total Expenditures and Other Financing Uses) **(3,058,411.91)**

ALUM ROCK UNION ELEMENTARY SCHOOL DISTRICT 3.01

2930 Gay Avenue
San Jose, CA 95127

Office of Superintendent of Schools

ITEM REQUIRING ATTENTION – BOARD OF TRUSTEES

To the Board of Trustees:

Subject : **ACCEPTANCE OF MEMORANDUM(S) OF UNDERSTANDING**

Staff Analysis:
The District has received the following Memorandum(s) of Understanding as summarized on the sheet(s) dated March 30, 2023.

Recommendation:
Staff recommends acceptance of this memorandum(s) of understanding. MOU details are on file in the Purchasing Office.

Prepared by:: Maria J. Martinez M.M Title: Procurement Manager

Approved by: Kolvira Chheng Title: Assistant Superintendent of Business Services

To the Board of Trustees: Meeting: March 30, 2023

Recommend Approval Special Board Meeting

3.01

Agenda Placement Hilaria Bauer, Ph.D., Superintendent

DISPOSITION BY BOARD OF TRUSTEES

Motion by: _____ Seconded by: _____

Approved: _____ Not Approved: _____ Tabled: _____

Alum Rock Union Elementary School District
March 30, 2023 Special Board Meeting

MEMORANDUM(S) OF UNDERSTANDING

DEPARTMENT	DATE OF SERVICE	CONSULTANT NAME	COST	PURPOSE
Academic Services/ VAPA Maria Thomas	03/31/23-04/28/23	Santa Clara County Office of Education (SCCOE)	No Cost	SCCOE will have Mariachi Los Gavilanes host school concerts at the following sites: Russo/McEntee, Renaissance II, Adelante I, Ocala, Painter, and Sheppard on 4/4/23. SCCOE will host ARUSD Mariachi & Adelante Folklorico at Mexican Heritage Plaza on 4/5/23.

ALUM ROCK UNION ELEMENTARY SCHOOL DISTRICT

Request for Contracted Services

To: BUSINESS OFFICE Contract No.: _____ Vendor No.: 010547

Academic Services (School/Dept) and the Alum Rock Union Elementary School District (ARUESD), whose address is 2930 Gay Avenue, San Jose, CA 95127, and the following named Contractor wishes to enter a:

- [x] **MOU** (negotiated Agreement)
- [ ] Exhibit B & C (Fingerprinting and TB Test)
- [ ] **MASTER CONTRACT PARTICIPATION**
- [ ] Scope of Work/Proposal

Note: All Contracts over $5,000 require pre-approval.

* *Use Independent Contractor Agreement (PUR-116) for unincorporated individuals or in the absent of negotiated agreement.*

Name of Individual/Company: Santa Clara County Office of Education (SCCOE)

Address: 1290 Ridder Park Drive City: San Jose State: CA Zip: 95131

Phone: (408) 453 - 6542 Email: amunshi@sccoe.org

SSN: _____ Fed I.D. #: _____

CONTRACT TERM: start dates March 31, 2023 end date April 28, 2023

CONTRACTOR'S OBLIGATION:
Description of services to be provided: (Please attach proposals, scope of work, and other documentation.)

SCCOE will have Mariachi Los Gavilanes host school concerts at the following sites: Russo/McEntee, Renaissance II, Adelante I, Ocala, Painter, and Sheppard on 4/4/23. SCCOE will host ARUSD Mariachi & Adelante Folklorico at Mexican Heritage Plaza on 4/5/23..

COMPENSATION: In consideration of Contractor's provision of services as described above, and subject to the payment provisions expressed herein, ARUESD shall pay Contractor, upon Contractor's submission of a properly documented demand for payment (Invoice) which shall be submitted not later than 30 days from the end of the month in which the contract services were rendered, and upon approval of such demand by ARUESD as follows: (Check either a or b)

____ a. **Fee Rate:** $_____ per _____ Not to Exceed _____ of services.

__x__ b. **Other:** $Zero cost

Describe other related costs: _____

BUDGET CODE: 010-0000-0-5815-00-1110-1000- _____ Accountant Initials

000000-310-7221 _____ Accountant Initials

APPROVALS:

ALUM ROCK UNION ELEMENTARY SCHOOL DISTRICT:

Site/Department Administrator: _____ Date: 3/15/23

Director of Fiscal Services: _____ Date: _____

Asst. Supt., of Business Services: _____ Date: 3/22/23

Superintendent: _____ Date: _____

Santa Clara County Office of Education

Memorandum of Understanding
between
Santa Clara County Office of Education
and
(Alum Rock Union School District)

This Memorandum of Understanding (MOU), hereinafter referred to as the "Agreement", is between the Santa Clara County Office of Education (SCCOE) and Alum Rock Union School District (the "Agency"). SCCOE and the Agency can each be referred to as the "Party" or collectively as the "Parties" for the purpose of this Agreement.

1. Overview

This Agreement outlines the responsibilities and commitments of each Party regarding the participation in the 2023 SCCOE Mariachi Education Tour of Santa Clara County Schools. The students of Mariachi Los Gavilanes and mariachi directors will be able to work with local mariachi students and their teachers in preparation for the mariachi showcase. The activities will culminate in *¡Viva el mariachi!* Showcase on Wednesday, April 5, 2023, at the Mexican Heritage Plaza in San Jose, showcasing the performances of youth mariachi and ballet folklórico groups from Santa Clara County school schools.

2. Goals

☒ Improve access to inclusive, equitable, high-quality education.
☒ Provide quality support to districts, schools, students, and communities.
☒ Be a premier service organization.

3. Responsibilities

3.1. The Agency Responsibilities:

3.1.1 The Agency authorizes their district administrators and selected student groups from Alum Rock Union School District to participate in the 2023 SCCOE Mariachi Education Tour of local Santa Clara County schools on April 3-5, 2023.

3.1.2 The Agency recognizes that the student groups from their district schools submitted an application to perform at the 2023 ¡Viva el mariachi! Showcase at the Mexican Heritage Plaza on April 5, 2023, and that the following groups have been selected to the performance roster:

ARUSD Mariachi and Adelante I Folklórico Group Colibrí

3.1.3 On April 5, 2023, at the Mexican Heritage Plaza, the Agency's selected school groups will participate in the performance dress rehearsal from 2:00-5:00 p.m., to run their portion of the program to get a sense of the space and do a sound check for their group. Dinner will be provided by the SCCOE for the students and adults in their group. The school groups should be at the Mexican Heritage Plaza from 2:00 p.m. until after their respective performances, or the end of the event.

3.1.4 Transportation/Chaperones: The Agency's school groups will make sure that they arrange for transportation and have the necessary number of chaperones to make this event a success. Students must be supervised at all times during this event. The school must follow protocol for student travel.

3.1.5 Recorded Music/Other Requirements: The ballet folklórico groups that perform to recorded music should provide a device with the music already arranged in the order the school would like to have it played for the audio technician. If the school has other needs, please contact the SCCOE Arts Coordinator, Sofia Fojas

3.1.6 Green Rooms: Spaces will be provided for the student group(s) to store cases and for staging purposes before students go on stage to perform. The School should limit the number of items to be stored and have a system for arranging it in the most efficient way possible while in the green room.

3.1.7 SCCOE Media Release and School Permission Slip Forms: The Agency shall complete these forms as required by both SCCOE and the district protocols.

3.1.8. School Performance(s): At least one school within the Agency's district has requested a school performance from the youth group Mariachi Los Gavilanes from Las Vegas. Mariachi Los Gavilanes will perform at the school(s) within the following timeframe on Tuesday, April 4, 2023: 8AM-2PM. Lunch for Mariachi Los Gavilanes will be provided by SCCOE to be served on an Agency school site. The final schedule will be confirmed two weeks from the ARUSD tour date.

3.2. The SCCOE Responsibilities:

3.2.1 SCCOE will be responsible for providing the venue, dinner, and rehearsal space on April 5, 2023, from 2:00-8:00 PM.

3.2.2 School Concerts: Mariachi Los Gavilanes from Clark County School District in Las Vegas will be our headlining group on April 5, 2023. There is an opportunity to have them provide an in-school performance for mariachi tour group to perform for your class or your school. These have been scheduled on Tuesday, April 4 from 8am-2pm at various sites to be determined. A schedule will be sent to Maria Thomas, VAPA, PE, and Sports Coordinator by March 10, 2023.

3.2.3. SCCOE will develop a schedule of school visits, workshops to schools as requested. SCCOE will also create protocols and procedures to ensure the safety and smooth execution of the 2023 ¡Viva el mariachi! Showcase by creating a Run of Show for the concert and dress rehearsal, a concert order, assign green rooms and have an appropriate level of supervision of the general public at the venue.

3.2.4. SCCOE will provide tickets free of charge to each attendee through Eventbrite and will share that information to schools and their communities.

3.3. Shared Responsibilities:

3.3.1. SCCOE and the Agency will maintain communication around the needs of both the schools and the tour group Mariachi Los Gavilanes from Clark County School District in Las Vegas and their directors.

3.3.2. Both SCCOE and the Agency will ensure the safety of students and staff and have protocols in

place to address any issues, concern, or emergencies.

3.3.3 The Agency will coordinate with SCCOE to provide a staging area for performing as well as a separate space for case storage for school performances.

4. Duration of Agreement

This Agreement begins on February 27, 2023 and ends on April 28, 2023.

5. Articulation of Monies/Compensation

There is no compensation associated with these services

6. Data Sharing

The services performed under this Agreement include the sharing of non-publicly available employee or student data.

☐ Yes, Data Sharing agreement/form attached

☒ No

7. Termination

Either the Agency or the SCCOE may terminate this Agreement with or without cause upon 30 days advance written notice to the other Party.

8. Other Terms

8.1. Entire Agreement: This Agreement and its appendices and exhibits (if any) constitute the final, complete, and exclusive statement of the terms of the agreement between the Parties. It incorporates and supersedes all the agreements, covenants and understandings between the Parties concerning the subject matter hereof, and all such agreements, covenants and understandings have been merged into this Agreement. No prior or contemporaneous agreement or understanding, verbal or otherwise, of the Parties or their agents shall be valid or enforceable unless embodied in this Agreement.

8.2. Amendments: This Agreement may only be amended by a written instrument signed by the Parties.

8.3. Severability: Should any part of this Agreement between SCCOE and the Agency be held invalid, illegal, or unenforceable in any respect, such invalidity, illegality, or unenforceability shall not affect the validity of the remainder of the Agreement, which shall continue in full force and effect, provided that such remainder can, absent the excised portion, be reasonably interpreted to give the effect to the intentions of the parties.

8.4. Third-Party Beneficiaries: This Agreement does not, and is not intended to, confer any rights or remedies upon any person or entity other than the Parties.

8.5. Assignment: No assignment of this Agreement or of the rights and obligations hereunder shall be valid without the prior written consent of the other Party.

8.6. Use of SCCOE Name and Logo for Commercial Purposes: Agency shall not use the name or logo of SCCOE or reference any endorsement from SCCOE in any manner for any purpose, without the prior express written consent of SCCOE as provided by the SCCOE's authorized representative, or designee.

8.7. Governing Law, Venue: This Agreement has been executed and delivered in, and shall be construed and enforced in accordance with, the laws of the State of California. Proper venue for legal action regarding this Agreement shall be in Santa Clara County.

9. Insurance/Hold Harmless

9.1 Insurance: The SCCOE and the Agency shall maintain a certificate of insurance in the Business Office of each respective office.

9.2 Indemnification: Each Party will defend, indemnify, and hold the other Parties, their officers, employees, and agents harmless from and against any and all liability, loss, expense (including reasonable attorney's fees), or claims for injury or damages arising out of the performance of this Agreement but only in proportion to and to the extent such liability, loss, expense, attorney's fees, or claims for injury or damages are caused by or result from the negligent or intentional acts or omissions of the indemnifying party, its officers, employees, or agents.

10. Execution Authority

Each individual executing this Agreement on behalf of a Party represents that they are duly authorized to execute and deliver this Agreement on the entity's behalf, including, as applicable, the Governing Board, Superintendent, Board of Directors, or Executive Director. This Agreement shall not be effective or binding unless it is in writing and approved by the SCCOE's authorized representative, or authorized designee, as evidenced by their signature as set forth in this Agreement.

11. Electronic Signatures/ Signatures

Unless otherwise prohibited by law or SCCOE policy, the Parties agree that an electronic copy of a signed contract, or an electronically signed contract, has the same force and legal effect as a contract executed with an original ink signature. The term "electronic copy of a signed contract" refers to a transmission by facsimile, electronic mail, or other electronic means of a copy of an original signed contract in a portable document or other format. The term "electronically signed contract" means a contract that is executed by applying an electronic signature using technology approved by SCCOE.

Santa Clara County Office of Education

SCCOE:

By: _____
Signature of Authorized SCCOE Official

Name: Anisha Munshi, Ed.D.

Title: Associate Superintendent, Professional Learning and Instructional Support Division

Date: _____

Address: 1290 Ridder Park Drive, MC 237
San Jose, CA 95131

Phone: (408) 453-6542

Email: amunshi@sccoe.org

Alum Rock Union School District:

By: _____
Signature of Authorized Agency Official

Name: Dr. Hilaria Bauer

Title: Superintendent, Alum Rock Union School District

Date: _____

Address: 2930 Gay Avenue
San Jose, CA 95127

Phone: (408) 928-6862

Email: hilaria.bauer@arusd.org

For Contracts Office/Risk Management use only:

RM#: _____

Date: _____

Signature: _____

Process for Interviewing Firms

1. Firms will be interviewed in person in the Board Room by the Board of Trustees
2. Firm will be allowed to bring up to three (3) representatives.
3. All firms will report to the Board Room at the beginning of the meeting to witness how the order of the interviews will be determined
4. Name of firms will be placed in a box and randomly pulled to determine the order in which they will be interviewed
5. Once the order is determined, the firm to be interviewed first will remain in the Board Room and all other firms will be placed in a waiting room until their turn comes up
6. Each firm will be allotted a total of half an hour (30 minutes) for the interview, which consists of the following:
    a. 10 minutes will be allotted for firms to present to the Board of Trustees
    b. 20 minutes will be allotted for the Board of Trustees to ask a total of 5 questions
        i. Firms will have 2 minutes to answer each question
        ii. Each Board Member will ask a total of 1 question
        iii. Each Board Member will ask the same 1 question to all firm
        iv. Board Members will send their question to the Superintendent prior to the meeting to avoid duplication
7. Ranking options to be determined by the Board of Trustees
    a. After each firm is interviewed, each Board Member will submit their score to the Administration
        i. Once all firms are interviewed, the Administration will tally the scores and present the results on the screen for all to see
    b. Once all firms are interviewed, each Board Member will provide their scoring for each firm to the Administration to be tallied and presented on the screen for all to see
8. Board members will score each firm between 1 to 10, with 1 being least desirable and 10 being most desirable
9. In the event there is a tie with the top finalists, the Board of Trustees will consider the following options to break the tie
    a. Board Members will re-score the finalists that are tied
    b. Re-interview the tied finalists
10. The firm receiving the highest score will be selected as the finalist and will be subject to a thorough background check
11. If the finalist does not clear the background check, the runner-up will be selected as the finalist and will be subject to a thorough background check
    a. This process will continue until the finalist clears background check