



**PASADENA UNIFIED SCHOOL DISTRICT
FACILITIES TASK FORCE**

NOTICE AND AGENDA

**September 22, 2021
3:30 PM**

**Teleconference Meeting Only
To join the meeting:**

By phone dial (US) +1 470-485-8951 PIN: 898 254 923#

From your computer, on your calendar invite click on [Join with Google Meet](#)

From your computer, type in your browser: meet.google.com/wuj-sxms-dzs

Purpose: To create a set of recommendations regarding the use of facilities that the full Board can adopt.

Item	Presenter	Time
Welcome and Introductions	Dr. Leslie Barnes	3:30 pm
Review of Minutes	Dr. Leslie Barnes	3:35 pm
Discussion of Draft Use of Properties	Dr. Leslie Barnes	3:40 pm
Presentation of Process for Implementation of Affordable Workforce Housing	Bruce Dorfman Education Housing Partners	3:50 pm
Future Agenda Items	Dr. Leslie Barnes	4:50 pm
Future Meeting Dates	Dr. Leslie Barnes	4:55 pm
Adjournment	Dr. Leslie Barnes	5:00 pm

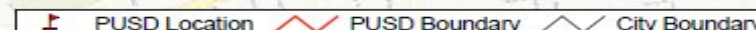


Pasadena Unified School District

Facilities Task Force
Meeting December 3, 2020

PUSD Properties									Page 1
No.	Site	Year Built	Status	User	Facility Use Agreement		Annual Revenue	Area	
					Term	Expiration		sf	acres
1	Allendale	1948	Vacant	NA	NA	NA	NA	136,130	3.13
2	Audubon	1943	Leased	Odyssey Charter	10 years	6/30/2025	\$96,984	250,124	5.74
3	Burbank	1950	Leased	Stratford	15 years	6/30/2034	\$1,200,366	161,493	3.7
4	Burbank - Minoru	1967	Leased	NA	NA	NA	NA	21,125	0.48
5	Cleveland	1934	Partly Leased	Odyssey Charter South	1 year	6/30/2021	\$69,430	173,312	3.98
				PUSD - SPED & ECE	NA	NA	NA		
6	Ed. Center	1925	PUSD	Admin Offices Rose City HS	NA	NA	NA	190,636	4.38
7	Edison	1960	Partly Leased	Alma Fuerte	1 year	6/30/2021	\$37,707	194,062	
				Focus Point Academy	NA	NA	NA		4.46
8	Franklin	1950	Vacant	PUSD IT	NA	NA	NA	240,256	5.52

PUSD Properties								Page 2	
No.	Site	Year Built	Status	User	Facility Use Agreement		Annual Revenue	Area	
					Term	Expiration		sf	acres
9	Hodges - Peoria	NA	Leased	Pacific Clinics	5 years	1/1/2025	\$88,830	44,753	1.03
				Young & Healthy	5 years		\$6,000		
10	Jefferson	1935	Vacant	NA	NA	NA	NA	266,097	6.11
11	Linda Vista	1971	Partly Leased	L Vista Children Ctr.	1 year	8/31/2021	\$61,770	290,491	6.67
				City of Pasadena	NA	NA	NA		
				PUSD	NA	NA	NA		
12	Loma Alta	1953	Leased	Rosebud Academy	1 year	6/30/2021	\$37,663	233,057	5.35
				Oak Knoll Montessori	5 years	6/30/2025	\$127,621		
13	Madison La Casita	1923	PUSD	Armory	1 year	6/9/2021	In-kind Services	4,654	0.11
14	Noyes	1952	Leased	Aveson Charter School	1 year	6/30/2021	\$88,283	328,109	7.53
15	Roosevelt	1953	Vacant	Metro Patrol	6 months	6/30/2021	In-kind Services	220,502	5.06
				SPED MTU (OT/PT)	NA	NA	NA		
16	Wilson	1926	Partly Leased	Renaissance Academy	6 months	2/28/2021	\$51,300	598,258	13.73
				PUSD - PALS SPED	NA	NA	NA		

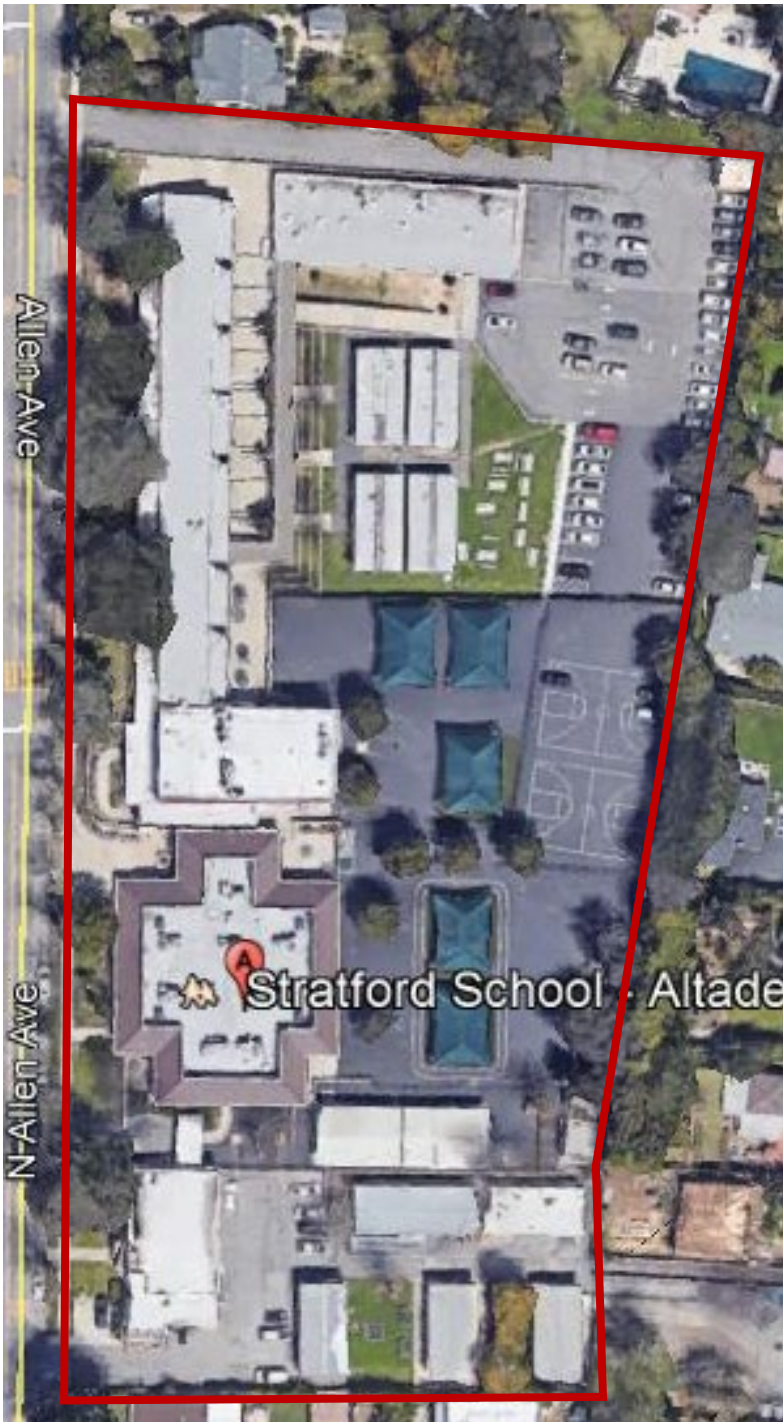




Address	1135 S. Euclid Avenue, Pasadena, CA 91106
Year Built	1948
Approx. area	136,130 sf
	3.13 acres
Status	Vacant



Address	725 W Altadena Dr., Altadena, CA 91001
Year Built	1943
Approx. area	250,124 sf
	5.74 acres
Status	Leased
Lessee	Odyssey Charter
FUA Term	10 years
FUA Expiration	6/30/25
Annual Revenue	\$96,984
FUA= Facility Use Agreement	



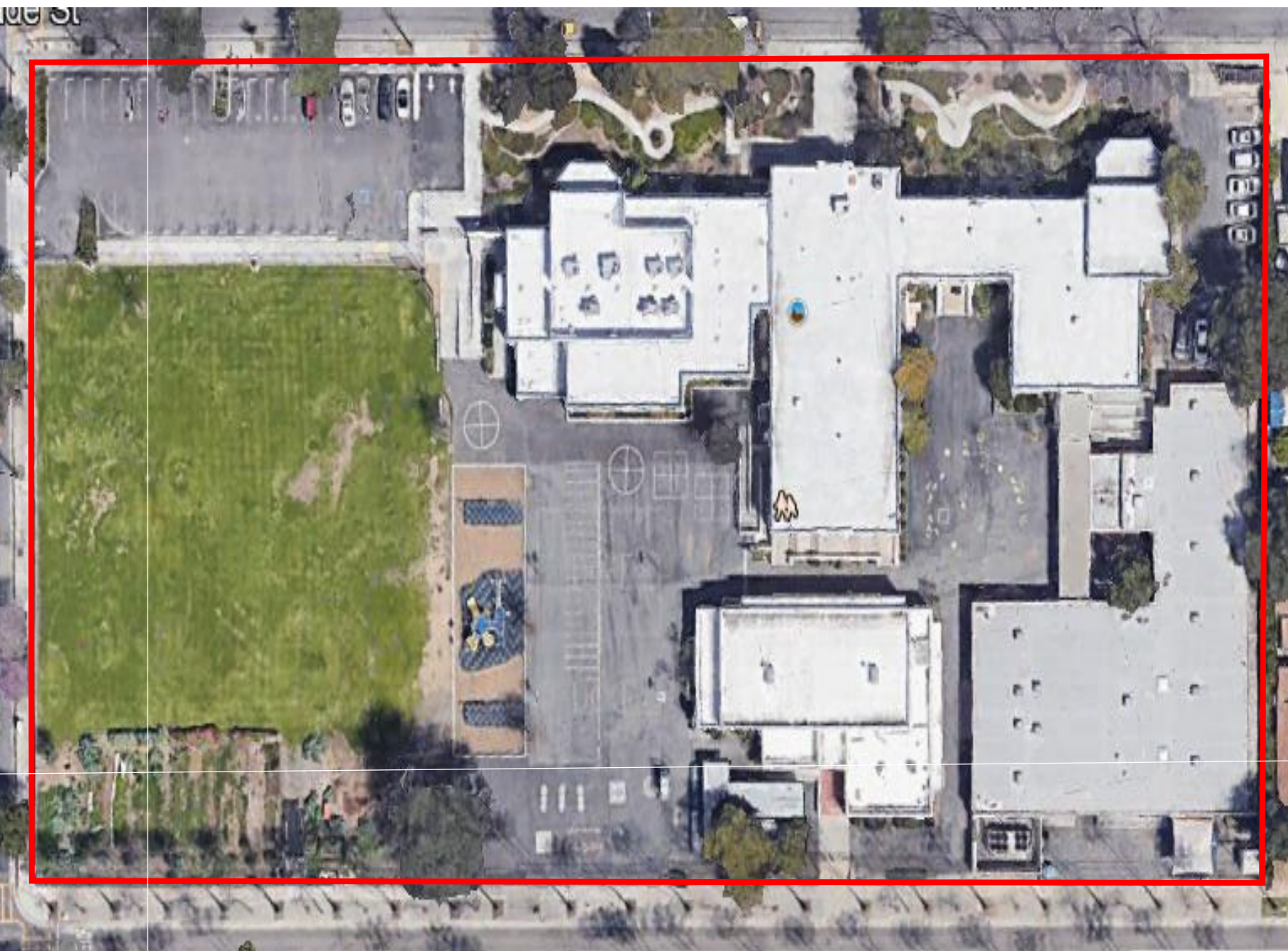
Address	2046 Allen Ave, Altadena, CA 91001
Year Built	1950
Approximate area	161,493 sf
	3.7 acres
Status	Leased
Lessee	Stratford
FUA Term	15 years
FUA Expiration	6/30/2034
Annual Revenue	\$1,200,366
FUA= Facility Use Agreement	

Burbank-Stratford



Address	2075 Minoru Dr, Altadena, CA 91001
Year Built	1967
Approximate area	21,125 sf
	0.48 acres
Status	Vacant
Lessee	NA
FUA Term	NA
FUA Expiration	NA
Annual Revenue	NA

FUA= Facility Use Agreement



Address	524 Palisade St., Pasadena, CA 91103
Year Built	1934
Approx. area	173,312 sf
	3.98 acres
Status	Partly Leased
Lessee	Odyssey Charter South (OCS) SPED & ECE
FUA Term	OCS 1 year agreement
FUA Expiration	6/30/21
Annual Revenue	OCS \$69,429.63
FUA= Facility Use Agreement	

Ed. Center



Address	350 S. Hudson Ave., Pasadena, CA 91101
Year Built	1925
Approx. area	190,636 sf
	4.38 acres
Status	PUSD
Use	Admin Offices & Rose City HS

[Return to sites list](#)



Site	Edison
Address	119 W. Palm Ave., Altadena, CA 91001
Year Built	1960
Approximate area	194,062 sf
	4.46 acres
Status	Partly Leased
Lessee	Alma Fuerte Charter(AFC) Focus Point Academy (FPA)
FUA Term	AFC 1 year
FUA Expiration	6/30/21
Annual Revenue	AFC \$37,706.80
FUA= Facility Use Agreement	



Address	527 W. Ventura , Altadena, CA 91001
Year Built	1950
Approximate area	240,256 sf
	5.52 acres
Status	Vacant
Lessee	PUSD IT - Temporary Chromebook Distribution

Hodges-Peoria

Address	136 W Peoria St, Pasadena, CA 91103
Year Built	0
Approx. area	44,753 sf
	1.03 acres
Status	Leased
Lessee	Pacific Clinics - Young & Healthy
FUA Term	PC 5 year Y&H 5 year
FUA Expiration	PC 6/30/25 Y&H 2022 (?)
Annual Revenue	PC \$88,830.00
	Y&H \$6,000.00
FUA= Facility Use Agreement	

[Return to sites list](#)



Address	1500 E. Villa St., Pasadena, CA 91106
Year Built	1935
Approx. area	266,097 sf
	6.11 acres
Status	Vacant

Linda Vista



Address	1259 Linda Vista Ave, Pasadena, CA 91103
Year Built	1971
Approx. area	290,491 sf
	6.67 acres
Status	Partly Leased
Lessees	Linda Vista Children Center (LVCC) City of Pasadena
FUA Term	LVCC 1 year
FUA Expiration	8/31/21
Annual Revenue	LVCC \$61,770.00
FUA= Facility Use Agreement	

[Return to sites list](#)

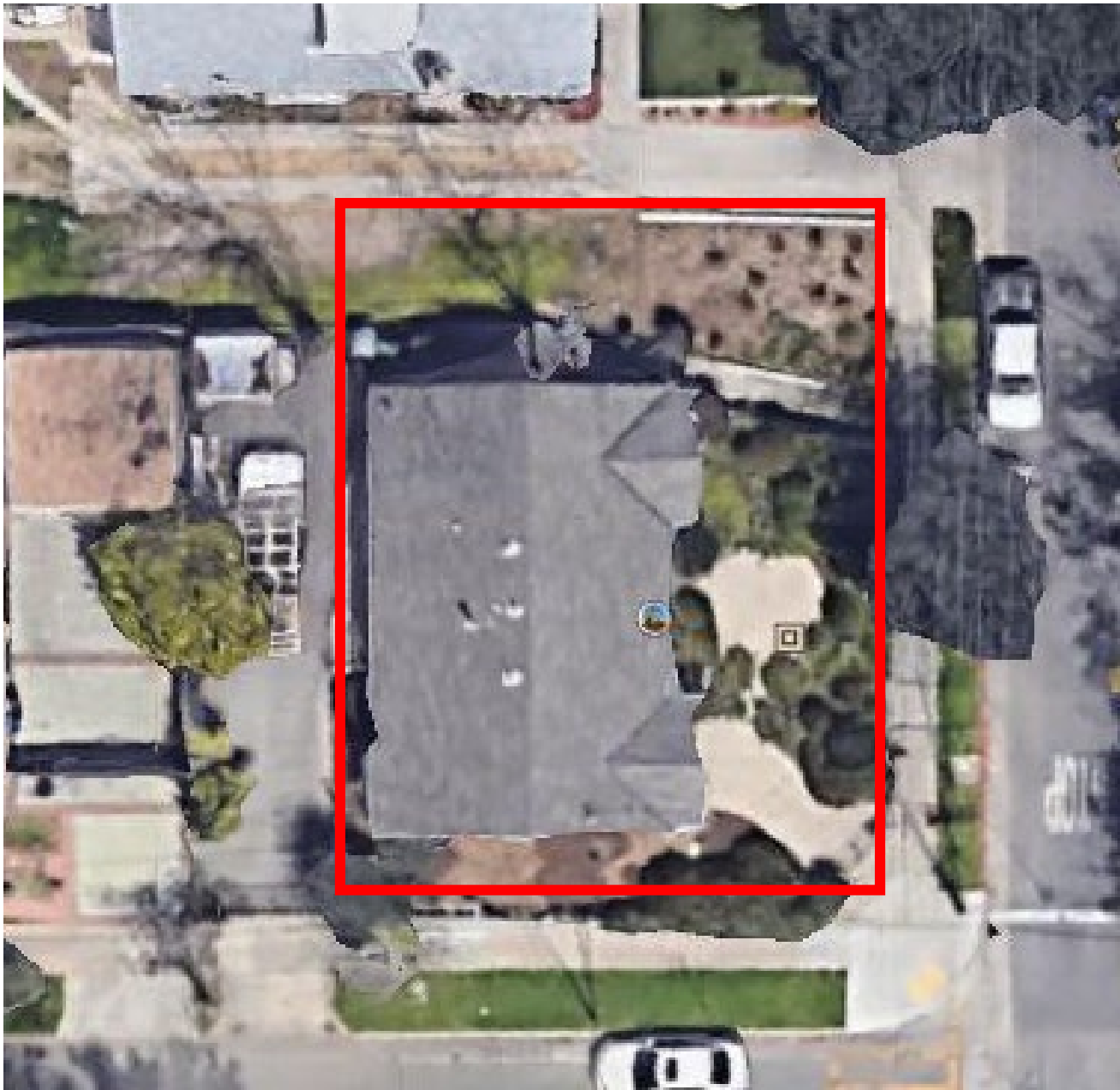
Loma Alta



Address	3544 North Canon Blvd, Altadena CA 91001
Year Built	1953
Approx. area	233,057 sf
	5.35 acres
Status	Leased
Lessee	Rosebud Academy Charter (RAC) Oak Knoll Montessori (OKM)
FUA Term	RAC 1 year OKM 5 year
FUA Expiration	6/30/21
Annual Revenue	RAC \$37,663.29 OKM \$127,620.94
FUA= Facility Use Agreement	

[Return to sites list](#)

Madison La Casita



Address	805 N Madison Ave, Pasadena, CA, 91104
Year Built	1923
Approximate area	4,654 sf
	0.11 acres
Status	PUSD
Lessee	Armory
FUA Term	NA
FUA Expiration	NA
Annual Revenue	NA
FUA= Facility Use Agreement	



Address	1919 East Pinecrest Dr., Altadena, CA 91101
Year Built	1952
Approx. area	328,109 sf
	7.53 acres
Status	Leased
Lessee	Aveson Charter School
FUA Term	1 year
FUA Expiration	6/30/21
Annual Revenue	\$88,283
FUA= Facility Use Agreement	

Roosevelt



Address	315 N. Pasadena Ave., Pasadena, CA 91103
Year Built	1953
Approx. area	220,502 sf
	5.06 acres
Status	PUSD Programs
Lessee	Metro Patrol (MP) SPED MTU (OT/PT)
FUA Term	MP 6 months
FUA Expiration	MP 6/30/2021
Annual Revenue	In-Kind Services
FUA= Facility Use Agreement	

[Return to sites list](#)



Address	300 S. Madre St., Pasadena, CA 91107
Year Built	1926
Approximate area	598,258 sf
	13.73 acres
Status	Partly Leased
Lessee	Renaissance Academy (RA) PALS
FUA Term	RA 6 months PALS - SPED
FUA Expiration	RA 2/28/2021 PALS NA
Annual Revenue	RA \$51,300.00 PALS NA
FUA= Facility Use Agreement	



PASADENA
Unified School District

Facilities Task Force Meeting

Dr. Leslie Barnes,
Chief Finance and Operations Officer

March 15, 2021

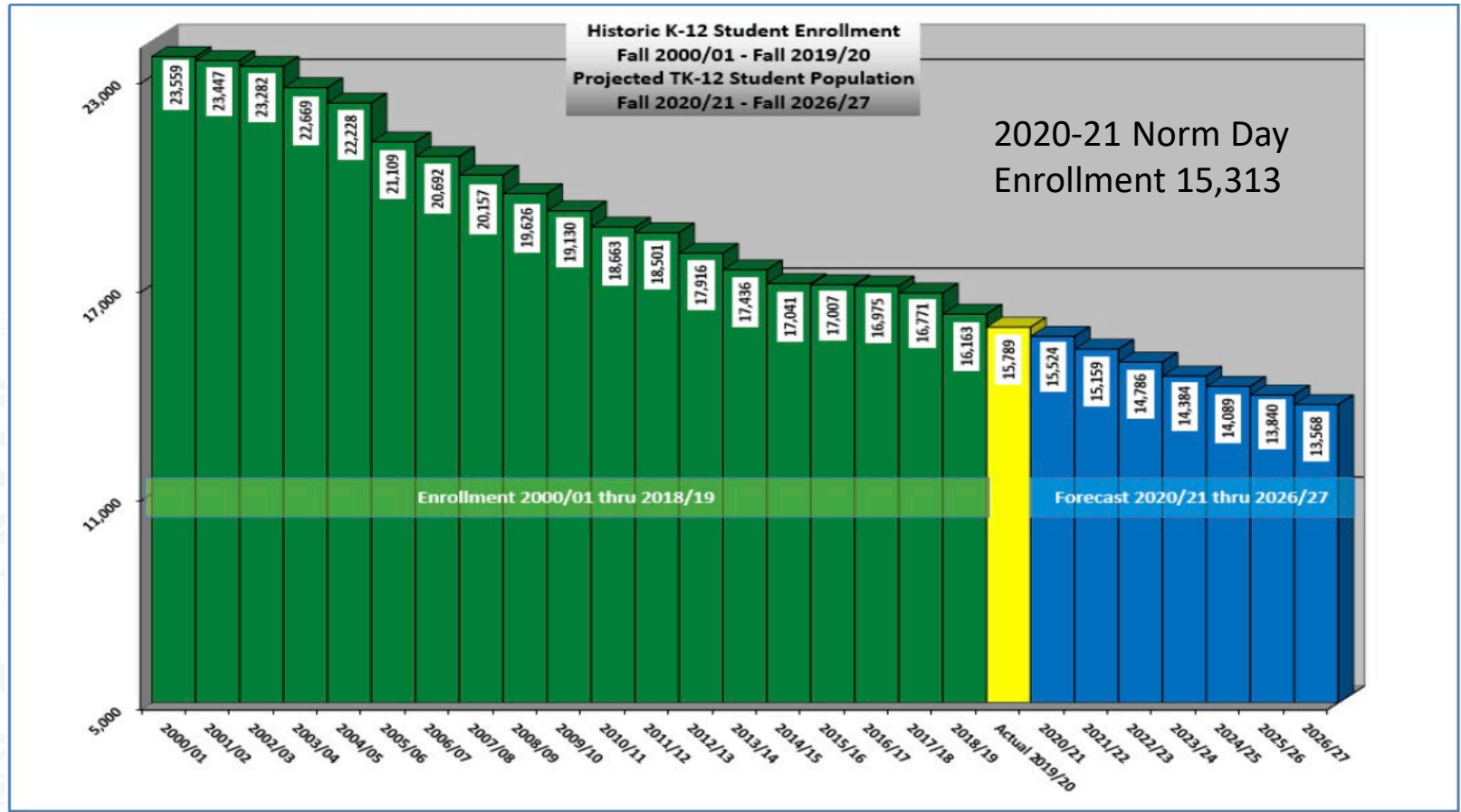
Our Children. Learning Today. Leading Tomorrow.

Agenda

- Welcome and Introductions
- Approval of Minutes
- Discussion of Enrollment Projections
 - 30 minutes
- Discussion of 7-11 Commission Guidelines
 - 35 minutes
- Discussion of Workforce Housing
 - 20 minutes
- Discussion of Future Agenda Items
- Future Meeting Dates
 - April 12, 2021 3:30pm-5:00Pm
 - May 10, 2021 3:30pm-5:00pm
 - June 14, 2021. 3:30pm-5:00pm



District Enrollment Projections



District Enrollment Projections

Academic Year	Charter School Enrollment	Non-Charter School Enrollment	Total Enrollment
2019-20	1,476	15,951	17,427
2018-19	1,408	16,340	17,748
2017-18	1,283	16,881	18,164
2016-17	1,345	17,065	18,410
2015-16	1,314	17,178	18,492
2014-15	1,319	17,267	18,586

District Norm Day Enrollment

FRPM/English Learner/Foster Youth - Differences between 2019-20 and 2020-21

Academic Year: 2020-2021			LEA: Pasadena Unified					Prepared by: Innovative Technology Services				
View: CERTIFIED SNAPSHOT as of 2.4.21								Not an official CALPADS Report				
			Age Eligibility: All (K-12,UE,US)									
			Free/Reduced Meal Eligibility Counts Based On:									
School Code	School Name	Total Enrollment	Free & Reduced Meal Program: 181/182	Foster	Homeless	Migrant Program: 135	Direct Certification	Unduplicated Eligible Free/Reduced Meal Counts	Unduplicated Eligible Free/Reduced Percentage	EL Funding Eligible	Total Unduplicated FRPM/EL Eligible Count	Unduplicated FRPM/EL Eligible Percentage
6021505	Altadena Elementary	469	297	7	18	0	226	298	63.5%	59	308	65.7%
1931062	Blair High	1102	618	18	41	0	389	624	56.6%	235	707	64.2%
6058465	Charles W. Eliot Middle	517	368	26	22	0	246	370	71.6%	75	383	74.1%
0117440	CIS Academy	154	100	3	7	0	72	100	64.9%	12	104	67.5%
6021554	Don Benito Fundamental	471	249	2	13	0	131	250	53.1%	40	258	54.8%
6021570	Field (Eugene) Elementary	450	126	1	0	0	48	127	28.2%	36	148	32.9%
6021612	Hamilton Elementary	535	288	1	14	0	149	288	53.8%	67	299	55.9%
6021620	Jackson Elementary	662	418	2	34	0	244	418	63.1%	124	429	64.8%
1936103	John Muir High	927	795	27	75	0	466	796	85.9%	81	797	86.0%
6021679	Longfellow (Henry W.) Elementary	634	529	5	35	0	333	531	83.8%	184	552	87.1%
6021687	Madison Elementary	488	438	13	53	0	311	440	90.2%	239	467	95.7%
1931674	Marshall Fundamental	2012	1431	13	90	0	768	1434	71.3%	161	1446	71.9%
6120265	McKinley	935	711	22	53	0	445	712	76.1%	143	727	77.8%
1932409	Norma Coombs Elementary	346	236	3	8	0	146	237	68.5%	62	250	72.3%
0000001	NPS School Group for Pasadena Unified	99	0	27	0	0	8	33	33.3%	9	38	38.4%
1936822	Pasadena High	1842	1140	31	96	0	648	1147	62.3%	93	1171	63.6%
1964881	Pasadena Unified	49	10	2	0	0	13	17	34.7%	4	20	40.8%
1936806	Rose City High (Continuation)	170	140	12	6	0	96	141	82.9%	17	142	83.5%
6021729	San Rafael Elementary	400	157	0	3	0	91	157	39.3%	38	166	41.5%
6021737	Sierra Madre Elementary	627	186	0	1	0	84	191	30.5%	14	195	31.1%
0127746	Sierra Madre Middle	588	208	5	7	0	106	209	35.5%	11	211	35.9%
6119549	Washington Elementary	445	383	16	29	0	283	384	86.3%	135	399	89.7%
6021752	Washington Middle	475	415	9	38	0	278	415	87.4%	114	417	87.8%
6021760	Webster Elementary	339	219	1	9	0	141	220	64.9%	42	232	68.4%
6021778	Willard Elementary	577	372	6	33	0	234	372	64.5%	118	395	68.5%
2020-21 TOTAL		15313	9834	252	685	0	5955	9911	64.7%	2113	10261	67.0%
2019-20 TOTAL		15951	10410	248	617	0	5869	10617	66.6%	2296	10932	68.5%
One year Difference		-638	-576	4	68	0	86	-706	-1.8%	-183	-671	-1.5%

Questions for Task Force members

- What additional, if any, enrollment information would you like to see?
- Do you feel comfortable, given the District's enrollment trend over the past several years, that closed properties should be used for other purposes?
 - Income producing endeavors
 - Workforce housing
 - Social objectives
 - City/County needs

Sale or Lease of District Surplus Property

According to the Lozano Smith's *Checklist for Sale or Lease of School District Surplus Property*, Revised January 2021. The following applies:

- Identify the surplus real property and create a committee to develop a District wide policy on the use of surplus real property (Ed. Code 17387, et seq.)
- Declare intent to sell or lease the property to general public:
 - To place the property on the market, the Board must consider the 7-11 committee's recommendation that the property be declared surplus and declare its intent to dispose of the property in a resolution (Ed. Code 17466)
- Naylor Act Requirements (Ed. Code 17485, et seq.)
 - Applies to real property that has been used entirely or partially for school playgrounds, playing fields, or other outdoor recreational uses and open space land particularly suited for recreational purposes.
 - If Naylor Act does apply, the district must offer to negotiate to sell or lease the property to certain entities, usually for a below-market rate.
 - Must allow 60 days for entities to reply
 - Waivers are available

Sale or Lease w/Option to Purchase

- The property must first be offered to a first group of designated entities for park and recreational purposes pursuant to Government Code sections 54220, *et seq.* (Ed Code 17464(b).)
 - Entities have 60 days after receiving notice to respond
 - Also entitled to a 90 day negotiation period after they have notified the District of their interest in the property.
 - This requirement cannot be waived
- The property must also be offered to a second group of designated public entities.
 - These entities also have 60 days after receipt of the notice to respond
 - Not entitled to additional 90 day negotiation period
- Offers required under Education and Government Codes may be made simultaneously (Ed. Code 17463.7(e)(2).)

Lease with no Option to Purchase

- No additional notices, beyond the requisite offers to Naylor Act entities, are *expressly* required.
 - The District may proceed to lease the property to the highest responsible bidder pursuant to Education Code Sections 17466, et seq. (Note: more conservatively, and in recognition of limited legal precedent, additional notices may still be sent.)
- Leasing vacant classrooms (Ed. Code 17465)
 - The District must offer the classrooms to other school districts in the District's SELPA or the County Office of Education "COE" for use for special education programs.
 - The districts or the COE are entitled to a negotiation period of 60 days from receipt of the offer.

Other Surplus Property Rules

- All Property sales (Govt. Code 65402 (C))
 - The District must notify the local city or county planning agency, if such city or county has adopted a general plan which affects or included the area where the property is located.
- Competitive bidding (Ed Code 17466, et seq.)
 - The District may ultimately sell or lease the property to the highest responsible bidder. Bids may not be opened until at least three weeks after the Board adopts its resolution of intent to sell or lease the property.
 - Districts may seek waivers of the competitive bidding process from the State Board of Education
 - In recent years, waivers from the bidding process have been granted, but districts have still been required to provide mandatory notices and engage in certain public procedures.

Other Surplus Property Rules

- The Education Code also contains a provision indicating that failure to comply with the Education Code's surplus property provisions or the Naylor Act will not invalidate a conveyance of property that has already occurred (Ed. Code 17483 & 17496)



Workforce Housing Presentation



Questions?



SVA **Architects, Inc.** **Faculty and Staff Housing**

March 5, 2021

Santa Ana | Oakland | San Diego

www.sva-architects.com





WHO WE ARE

SVA is at the forefront of creating vibrant master-planned communities for multi-cultural and multi-generational communities throughout California.

Our team is dedicated to design longevity and sustainability while achieving client satisfaction.



GOALS FOR FACULTY / STAFF HOUSING



Provides low-cost
and high quality
rental housing to
teachers and staff



Rents to be typically
30%+ discount to
market and qualify for
HUD low and/or
moderate income levels
60-80% AMI



Major benefit for
recruiting
and retaining
employees



Surplus property can
produce income
stream for the District
which increases over
time on Ground
Lease with District



DISTRICT / AGENCY ROLE

- Provides Surplus Site / Land – 60 yr + 30 yr
- Facilitate Good Neighbor Relationship with City
- P3's can Champion Project for District
- District Identifies Employees for Residency

CAPITAL REQUIREMENTS



- In P3 developments, no District general funds or guarantees are required for development or operations
- 100% of pre-construction and construction costs are funded by mortgage revenue bonds
- Rents are set at levels that cover all operating costs and debt service
- Rents are low due to
 - Lower development cost and no land costs
 - Lower operating costs and no property taxes
 - Tax exempt financing

OPERATIONS

- District has no operational responsibilities
- P3 coordinates third-party property management responsible for day-to-day maintenance, administration, and operations
- Apartment homes offered to district faculty & staff at below-market rental rates
- District owns all land and improvements





PROJECT EXPERIENCE

**Jefferson UHSD
Serramonte
Faculty & Staff
Housing**

Daly City, CA









Casa del Maestro

Santa Clara, CA



All units designed to be competitive with market-rate properties:

- Contemporary, open floor plans with patios and balconies
- In-unit laundry
- Walk-in closets
- 9-foot ceilings
- High-speed internet access
- USB charging outlets
- Sustainable building and landscape design, details, and systems
- Recreational amenities / community spaces
- Well-landscaped community courtyards
- ADA accessible units and amenities





A photograph of a modern multi-story apartment building at dusk. The building features a mix of light-colored stucco and darker textured panels. Large windows and glass doors are illuminated from within, casting a warm glow. The sky is a mix of blue and pinkish-purple. In the foreground, there's a paved area with some landscaping, including small trees and shrubs. A street lamp is visible. On the right, a blue circular graphic contains the text 'Irvington Terrace' and 'Fremont, CA'.

Irvington Terrace

Fremont, CA

IRVINGTON
TERRACE

4139









An architectural rendering of a proposed faculty and staff housing development at Cal Poly SLO. The image shows several multi-story apartment buildings with a mix of brick and light-colored siding, featuring balconies and large windows. The buildings are arranged in a U-shape around a central green courtyard with a lawn and some trees. A winding road or path is visible on the left side, and a bus is parked on the street in the foreground. The background consists of rolling green hills under a clear sky. A blue circular graphic in the upper right corner contains the project name and location.

Cal Poly SLO Faculty & Staff Housing

San Luis Obispo, CA

Unit Distribution Summary:

420 Units

Neighborhood 1
3x36-Plex (4 Level / Flats) 108 Units

Neighborhood 2
3x14-Plex (3 Level / TH, Flats) 14 Units

Total: 42 Units

Neighborhood 3
3x18-Plex (3 Level / Flats) 54 Units

3x11-Plex (2 Level / Flats) 33 Units

Total: 87 Units

Neighborhood 4
Podium Building (3 LVL. over 2 LVL. Garage): 183 Units





An aerial photograph of the CSU Channel Islands University Glen campus. The campus features a large, uniform residential complex with white buildings and red-tiled roofs, arranged in a grid-like pattern. In the background, a large, rugged hill with sparse vegetation rises against a clear blue sky. The foreground shows a paved road with a few cars and some landscaping. A blue circular graphic in the top right corner contains the text "CSU Channel Islands University Glen" and "Camarillo, CA".

CSU Channel Islands University Glen

Camarillo, CA







Arden Family Apartments

Sacramento, CA





Thank you.



ARCHITECTS

www.sva-architects.com



PASADENA
Unified School District

Facilities Task Force Meeting

Dr. Leslie Barnes,
Chief Finance and Operations Officer

September 22, 2021

Our Children. Learning Today. Leading Tomorrow.

Agenda

- Welcome and Introductions
 - 5 minutes
- Approval of Minutes (5 minutes)
- Presentation of *Draft* Use of Properties
 - 10 minutes
- Presentation of Process for Implementation of Workforce Housing (Dale Scott & Bruce Dorfman)
 - 1 Hour
- Discussion of Future Agenda Items
 - 5 minutes
- Future Meeting Dates
 - Third Wednesday of the Month @3:30pm - 5:00pm



Draft Recommendations for the Board of Education

- **District use**
 - District need to consolidate programs
 - Anticipated District and programmatic needs/goals
 - Current use and ability to move tenants, such as Charter Schools currently using Proposition 39 request for facilities
- **Income producing endeavors**
 - District need for the property in the future for educational purposes
 - Potential revenue stream for the District
- **Workforce housing**
 - Does the site lend itself to workforce housing: size, location, community support
- **Social objectives/Community Needs**
 - Site location
 - Immediate or future needs of the community
 - Community support

Establishment of Property Categories

Draft Recommendations for the Board of Education

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				Oak Knoll Montessori	5 years	6/30/2025	\$127,621		
13	<u>Madison La Casita</u>	1923	PUSD	Armory	1 year	6/9/2021	In-kind Services	4,654	0.11
14	<u>Noyes</u>	1952	Leased	Aveson Charter School	1 year	6/30/2021	\$88,283	328,109	7.53
15	<u>Roosevelt</u>	1953	Vacant	Metro Patrol	6 months	6/30/2021	In-kind Services	220,502	5.06
				SPED MTU (OT/PT)	NA	NA	NA		
16	<u>Wilson</u>	1926	Partly Leased	Renaissance Academy	6 months	2/28/2021	\$51,300	598,258	13.73
				PUSD - PALS SPED	NA	NA	NA		

Category Recommendations

District Use

- **Audubon**
 - Recommendation: Continue to Lease to Odyssey Charter
- **Cleveland**
 - Recommendation: Child Care/TK Center
- **Edison**
 - Recommendation: Continue to use for Charter Schools
- **Linda Vista**
 - Recommendation: Use original building for Professional Development Center/ continue with current income producing leases for Pre-School and social objective with the park
- **Loma Alta**
 - Recommendation: Continue to use for Charter and income producing lease for Private School

Category Recommendations

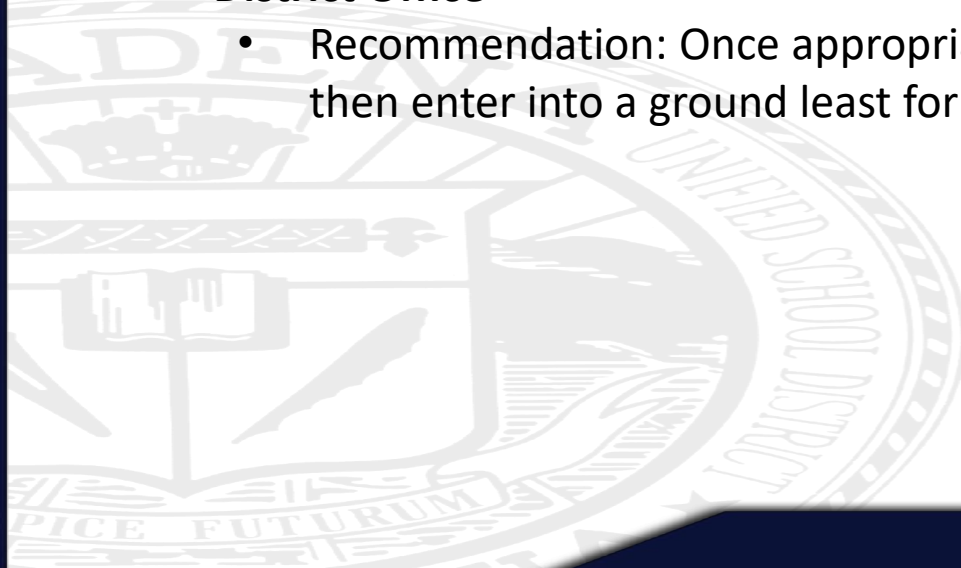
District Use

- **Wilson**
 - Recommendation: Consolidation of programs: PALS, Rose City, CIS, possible District Office space
- **Noyes**
 - Recommendation: Continue to use for Charter School lease
- **Edison**
 - Recommendation: Continue to use for Charter Schools

Category Recommendations

Income Producing Endeavors

- **Allendale**
 - Recommendation: Ground lease for development
- **Burbank**
 - Recommendation: Continue leasing to Stratford Private School
- **District Office**
 - Recommendation: Once appropriate site is chosen for relocation then enter into a ground lease for Development



Category Recommendations

Social Objectives

- **Franklin**
 - Recommendation: Adult Education and other social services
- **Hodges-Peoria**
 - Recommendation: Continue leasing to Young and Healthy
- **Jefferson**
 - Recommendation: Short-Term: Lease to City of Pasadena (5 years), Central Library, Fire Academy and Police (PALS program)
 - Recommendation: Long-Term: use for income producing property or future District Office
- **Madison - La Casita**
 - Recommendation: Continue to lease for the Arts program

Category Recommendations

Workforce Housing

- **Roosevelt**
 - Recommendation: Develop workforce housing on this site



Questions?



Pasadena Unified School District

Teacher-Staff Housing Presentation



EDUCATION HOUSING PARTNERS
A THOMPSON | DORFMAN COMPANY



DS&C
DALE SCOTT & CO

EDUCATION HOUSING PARTNERS

A THOMPSON | DORFMAN COMPANY

- Created as a resource for public agencies seeking to recruit and retain a quality workforce
- Provide quality workforce housing at rental rates significantly below market
- Rents are set at levels to cover all operating costs and debt service
- Resident base similar to TDP market-rate projects: young, college-educated, lifestyle focused



SVA Architects, Inc. | www.sva-architects.com

- Architectural / Planning / Interiors / Landscape / Sustainable Design
- Partners: Ernesto M. Vasquez, FAIA
Robert M. Simons, AIA
- Over 50 professionals
- Over four decades of residential/ mixed-use experience
- Extensive K-12 experience / Over 30 current K-12 school district clients
- Currently under construction is teacher housing for Jefferson Union HSD in Daly City, the first of its kind in the State





DS&C only advises California K-14 districts and has a proven track record of over 1,000 successful financings



We develop tailored, long-term bond programs to provide success now and in the future



For over 30 years, DS&C has a strong history of developing innovative yet practical financing solutions to help improve education and strengthen communities



DS&C structured the nation's first voter-approved Teacher-Staff Housing GO Bond®; winning a Bond Buyer's Deal of the Year Award

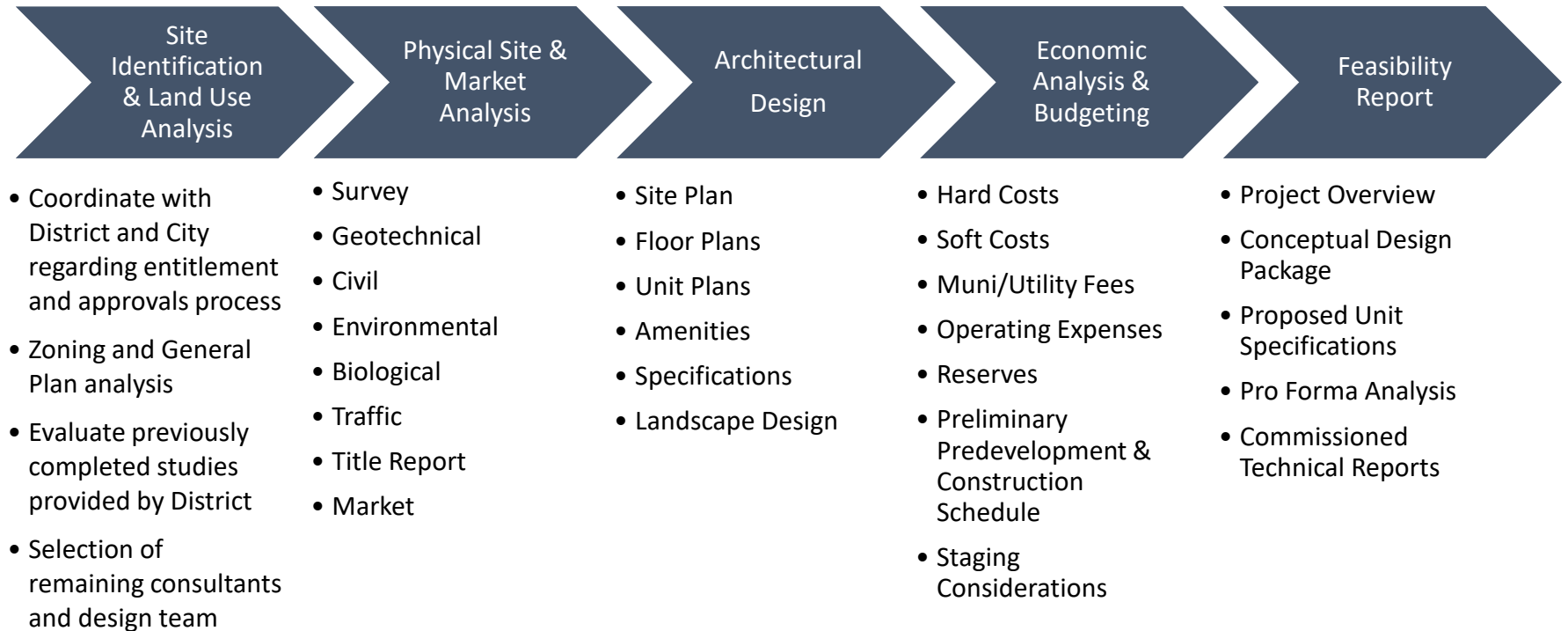
California Teacher-Staff Housing: Examples

District	County	Type of Financing	Project Status
Santa Clara USD – Phase I	Santa Clara	COPs	Operational since 2002
Santa Clara USD – Phase II	Santa Clara	COPs	Operational since 2009
San Mateo CCD – Phase I (College Vista)	San Mateo	COPs	Operational since 2005
San Mateo CCD – Phase II (Cañada Vista)	San Mateo	COPs	Operational since 2010
Jefferson Union High SD	San Mateo	GO Bonds	Approved by voters in June 2018; Under construction; 2022 projected completion
Soledad USD	Monterey	GO Bonds	Approved by voters in Nov 2020; Feasibility study completed
Chula Vista Elementary SD	San Diego	GO Bonds	Approved by voters in March 2020; No action to date
Alameda USD	Alameda	COPs	Feasibility study in progress
Novato USD	Marin	TBD	Feasibility study in progress
Sonoma Co Office of Education	Sonoma	TBD	Feasibility study in progress
San Jose USD	Santa Clara	TBD	Feasibility study in progress

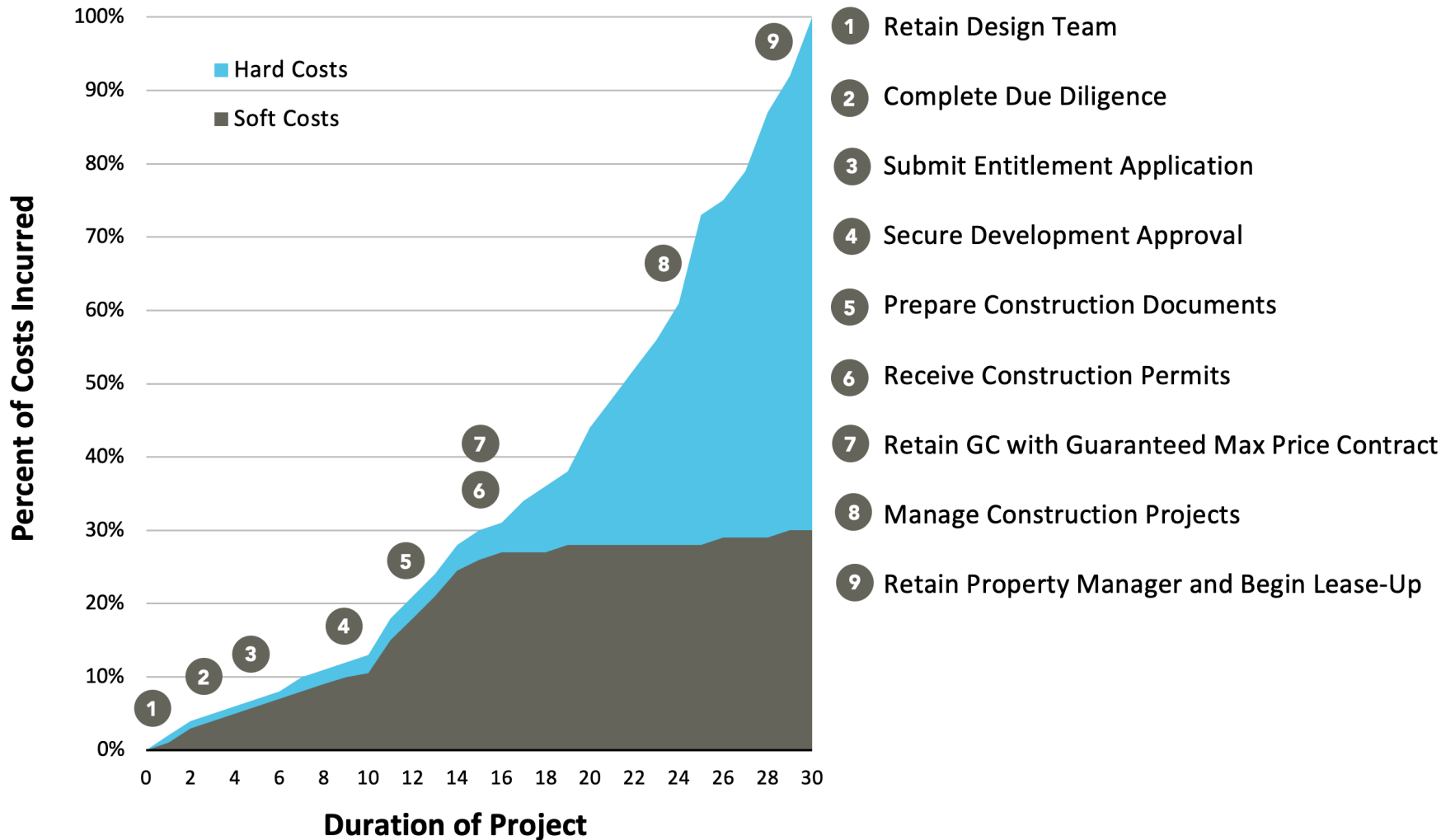
Pre-Feasibility Decisions



Feasibility Process



Capital Requirements



Source: Education Housing Partners

Case Study: Casa del Maestro

Design-Build Services for Faculty/Staff Housing

- District:** Santa Clara Unified School District (SCUSD)
- Size:** 40 units – Phase I
30 units – Phase II
- Community Engagement:** EHP principals held dozens of meetings with community members and neighbors to receive feedback and address concerns from teachers within the district. This was the first faculty/staff housing community built for a public school district in California.
- District Findings:** Five years after completion, SCUSD found that teachers of similar tenure who did not live at Casa del Maestro were nearly three times more likely to leave the District than those who did. These positive results led to EHP being engaged again for Phase II.



Case Study: Serramonte Del Rey Faculty Housing

First School District to offer Affordable Housing to Teachers

District: Jefferson Union High School District

Size: 3.3 Acres / 122 Units
Three & Four Stories

Program:

60	One-bedroom
56	Two-bedroom
6	Three-bedroom
147	Parking spaces

Delivery: Design-Build



Thank You

- Questions?
- Next Steps



APPENDIX

THOMPSON | DOREMAN

URBAN RESIDENTIAL DEVELOPMENT

- 35 years of development experience in California
- 75+ projects in California; 17,000+ units
- Focus on developing high quality, urban infill housing and mixed-use properties
- TDP principals formerly managed divisions for Trammell Crow Residential and the Irvine Company's "off ranch" apartment development and investment operations in Southern California and provided development advisory services to a number of corporate and public agencies
- Founded Education Housing Partners to support public school districts in the evaluation and development of educator housing in 2004

THOMPSON | DORFMAN

URBAN RESIDENTIAL DEVELOPMENT



THE TRITON | Foster City



ALEXAN WEBSTER | Oakland



1221 OCEAN AVENUE | Santa Monica



LA JOLLA PALMS | San Diego



ARCADIA AT STONECREST | San Diego

EDUCATION HOUSING PARTNERS

A THOMPSON | DOREMAN COMPANY



COLLEGE VISTA | San Mateo



CAÑADA VISTA | Redwood City



CASA DEL MAESTRO | Santa Clara



CASA DEL MAESTRO | Santa Clara

EHP Engagements

Faculty/Staff Housing Business Plan Engagements

- 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
- Soledad Unified School District
- Sonoma County Office of Education

Design-Build Contractor Engagements

- 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

EHP Services

Coordinate all design activities

- o Selection of designers, engineers and consultants
- o Conceptual design
- o Schematic design
- o Design development
- o Construction documents (architectural and engineering plans & specifications)

Coordinate all required reports and studies

- o Surveys and topography
- o Soils and geotechnical
- o Environmental
- o Traffic
- o Utility availability
- o Sound attenuation

Coordinate all entitlements and permits

- o Zoning
- o Environmental Review
- o Architectural Review
- o Building Permits

Provide construction management services

- o Coordinate contractor and subcontractor selection
- o Establish budgets, negotiate contracts, prepare monthly cost variance reports
- o Coordinate site and building construction, punch work and warranty
- o Review and approve all contractor and subcontractor payments, lien releases, and insurance certifications
- o Coordinate certificate of occupancy process
- o Coordinate unit turnover from the general contractor to the property manager



CASA DEL MAESTRO | Santa Clara