Ocean View School District

REQUEST FOR STATEMENT OF QUALIFICATIONS
AND REQUEST FOR PROPOSALS

FOR

PROPERTY EXCHANGE OR JOINT OCCUPANCY
OF REAL PROPERTY OWNED BY
OCEAN VIEW SCHOOL DISTRICT

February 24, 2026

Ocean View School District
Business Services Office
17200 Pinehurst Lane
Huntington Beach, CA 92647
(714) 847-2551

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REQUEST FOR STATEMENT OF QUALIFICATIONS AND REQUEST FOR PROPOSALS FOR PROPERTY EXCHANGE OR JOINT OCCUPANCY OF REAL PROPERTY OWNED BY OCEAN VIEW SCHOOL DISTRICT

I. BACKGROUND

The Ocean View School District ("**District**") owns a fee simple interest in approximately 13.8 acres of real property located at 7721 Juliette Low Drive, Huntington Beach, CA 92647; Assessor's Parcel Number 142-111-04, commonly known as Sun View School ("**Property**" or "**Premises**").

The District is requesting the submission of statements of qualifications and proposals ("**RFQ/P**") from qualified development firms, partnerships, corporations, associations, persons, or professional organizations ("**Firm(s)**") for the redevelopment of the Property pursuant to either a property exchange or joint occupancy agreement as follows:

- **Project Scope.** The District seeks proposals for the development, improvement, and operation of a project on the Property that includes soccer fields for children on a 2-acre portion of the Property and fifty parking spaces (the "Open Space"), along with a compatible use of the Firm's selection on the remainder of the Property (the "Development Area") (collectively, the "Project"). The Firm shall propose how the Open Space and the Development Area are to be situated on the Property.

- **Transaction Structure.** The District seeks either (a) to ground lease the Property pursuant to a joint occupancy agreement, or (b) to convey the Property in exchange for an income-producing property (the "Exchange Property").

    - A joint occupancy agreement would include outdoor recreational facilities for joint use by the District and the community. An employee housing complex under Government Code section 65914.7 would be preferred.

    - An exchange would occur after the selected Firm has obtained necessary land use approvals and entitlements for development of the Development Area, at which time the District would identify an income-producing Exchange Property of approximately equivalent value, which the selected Firm would acquire and convey to the District.

- **Firm Responsibilities.** The Firm will be responsible for the design, construction, operation, maintenance, and all other costs associated with the Project, except for costs directly related to the District's continued operations on the Property, if any.

- **Governing Law.**

    - A ground lease would be approved under and governed by the joint occupancy statutes set forth in Education Code section 17515 et seq.

    - In the event a proposal including employee housing is selected, the project may be developed as permitted by Government Code section 65914.7.

- An exchange would be approved under and governed by the exchange statutes set forth in Education Code section 17536 et seq.

"**Firm**" includes any companies (including partnerships, corporations, or sole proprietorships) that the Firm has acquired an ownership interest in (in whole or in part) or merged with during the past five (5) years.

II. DISTRICT'S DEVELOPMENT OBJECTIVES

A. Mission and Goals

The District strives to continually improve the academic achievement of all students and increase opportunities for them to be college and career ready through rigorous and relevant learning experiences. In collaboration with our families and community partners, we educate and inspire all students to achieve their unique potential.

Consistent with this mission, the District seeks to provide resources, educational opportunities, and community benefits through the strategic use of its real property assets, while retaining open space on former school campuses that surrounding neighborhoods value.

In furtherance of these objectives, the District seeks one of the following:

1. Joint Occupancy Ground Lease. Enter into a long-term joint occupancy ground lease, for a term of up to ninety-nine (99) years, with a development partner to redevelop the Property in a manner that best meets the needs of the District and the surrounding community while generating long-term revenue for the District; or

2. Property Exchange. Exchange the Property, excluding the Open Space, for an income-producing Exchange Property selected by the District, with the selected Firm responsible for acquiring and conveying the Exchange Property to the District.

B. Property Location & Conditions

The Property is adjacent to a public park of approximately 2.45 acres, known as Sun View Park, currently owned and operated by the City of Huntington Beach (the "City"). The size, configuration, and location of the Property make it well suited for residential development of the Development Area together with utilization of the Open Space for expansion and enhancement of neighboring park and open space uses.

Additional information regarding the location and layout of the Premises is provided in **Exhibit A**. The District intends to ground lease or exchange the Property in its current "as-is" condition, subject to limited representations and warranties to be negotiated as part of any final agreement.

C. Housing

The Property is designated Medium Density Residential ("MDR") under the City of Huntington Beach General Plan and zoned Public/Semipublic ("PS") pursuant to Chapter 214 of the Huntington Beach Municipal Code. The maximum residential density applicable to the Property under the General Plan is fifteen (15) dwelling units per acre. (Huntington Beach General Plan Land Use Element). However,

Government Code section 65914.7 permits school districts to construct employee housing at substantially higher densities by right. The District welcomes proposals for employee housing projects with densities of up to twenty (20) dwelling units per acre.

Requirements for an employee housing project to qualify for a zoning exemption include:

- For a period of fifty-five (55) years, either:
    - At least 30 percent of the total units of the housing development shall be set at a rent affordable to lower income households, and at least 20 percent of the housing development shall be set at a rent affordable to moderate-income households; or
    - At least 12 percent of the total units of the housing development shall be set at a rent affordable to very low income households, at least 15 percent of the housing development shall be set at a rent affordable to lower income households, and at least 20 percent of the housing development shall be set at a rent affordable to moderate-income households.
    - Before units may be rented to members of the general public, anticipated vacancies must be offered sequentially to:
        - District employees;
        - Employees of the elementary school districts in the District's boundaries and the Orange County Office of Education;
        - Employees of local agencies within the District's boundaries.

Projects developed under Section 65914.7 may also be exempt from the California Environmental Quality Act ("CEQA"). (Pub. Resources Code, § 21080.40.)

D. Park and Joint Use Requirements

As part of the redevelopment of the Property, the District requires that a 2-acre portion of the Property be reserved for park and joint-use recreational purposes with a minimum of fifty (50) parking spaces.

The District intends for the Open Space area to serve the needs of the surrounding community and, where applicable, District programs. Proposals shall clearly identify the location, configuration, access, parking, and operational characteristics of the Open Space area, including how the Open Space Area uses will be integrated with uses on the Development Area.

III. RFQ/P TIMELINE

The District intends to follow the timeline below with the understanding that the timeline may change according to the District's needs at the District's sole discretion, and without prior notice.

TIMELINE	
Issuance of RFQ/P:	Tuesday February 24, 2026
Advertisement Dates:	Monday March 9, 2026 Monday March 16, 2026 Monday March , 2026
Deadline for Firms to Submit Questions:	Monday April 6, 2026
District to Publish Responses to Questions:	Thursday April 16, 2026
Pre-Submittal Conference:	Thursday April 23, 2026
Due Date for Statement of Qualifications and Proposals:	Tuesday May 5, 2026
Recommendation of Selection of Partner Firm(s):	Tuesday June 9, 2026
Negotiate Joint Occupancy or Exchange Agreement:	June-July 2026
District Board Approval of Joint Occupancy or Exchange Agreement:	Tuesday July 14, 2026

IV. INSTRUCTIONS

To identify highly qualified Firms interested in contracting with the District, the RFQ/P will proceed as follows:

A. Access to Premises

District staff will accommodate reasonable requests to visit the Property. Firms seeking access for the purposes of conducting inspections, surveys, studies and reasonable, non-destructive tests of the Premises including, but not limited to, survey, topographical, architectural, building envelope, structural, utilities, and hazardous substances, will have the option to enter a right of entry agreement with the District.

A preliminary title report with plotted easement is available upon request. The District has also commissioned a geotechnical report from NMG Geotechnical, Inc., which will be made available once complete.

B. Submission of Questions

Questions regarding this RFQ/P shall be directed to Keith Farrow, Assistant Superintendent of Administrative Services at kfarrow@ovsd.org, and Katie Najera-Salgado, Administrative Assistant, at knajerasalgado@ovsd.org. **All questions regarding this RFQ/P must be submitted in writing by 11:59 PM on Monday, April 6, 2026.** Specify "RFQ/P for Sun View – [Firm Name] – Question" in the subject line.

Responses to all questions received will be posted on the District's website on or before **Thursday, April 16, 2026**. Questions via phone calls or other modes of communication other than e-mail will not be considered.

C. Pre-Submittal Conference

Interested Firms are invited to attend a pre-submittal conference on **Tuesday, April 23, 2026. at 12:00 PM**. The pre-submittal conference is an opportunity to interact with District staff and ask follow-up questions.

D. Final Proposals & Statement of Qualifications

Final Proposals and Statements of Qualifications **MUST BE RECEIVED ON OR BEFORE 11:59 PM on Tuesday, May 5, 2026.** Specify "RFQ/P for Sun View – [Firm Name] – Final Response" in the subject line.

No corrected or resubmitted Final Responses will be accepted after the above deadline. Any Final Responses or modified Final Responses submitted after the deadline may be deemed non-responsive and returned or discarded.

E. Interviews

After the evaluation team has reviewed the RFQs/Ps, the District may invite Firms to participate in an interview.

V. MANDATORY QUIET PERIOD

From the date of issuance until the RFQ/P process is completed, any interested Firm and/or their agent or representative, shall not communicate with any District administrator, staff member, member of the Board, member of the Measure K Citizens' Bond Oversight Committee, or member of any other Board or Board appointed committee, regarding this RFQ/P. All communications must be transmitted to the District's Point of Contact named herein. Any interested Firms violating the communications prohibition may be disqualified at the District's discretion.

VI. PROJECT REQUIREMENTS

The District will engage in the development of the Premises according to the following requirements. The District intends to select a qualified Firm that can demonstrate strong relevant experience with similar projects, financial capacity, and alignment to the District's mission and goals as outlined above. Evidence of ability to finance, undertake and complete the Project is crucial to a successful submission.

1. The District does not wish to participate in any way in financing the Project.

2. The selected Firm would be expected to provide funding for all aspects of the design, construction, and operation of the Project, at its own cost and expense. Moreover, the District may seek reimbursement from the selected Firm for consultant costs associated with the Project.

3. The selected Firm will be required to demonstrate adequate debt and equity financing to construct and operate the Project.

4. The selected Firm will be responsible for payment of any applicable property taxes for the Premises and personal property taxes for the development but may be entitled to apply for applicable property tax exemptions.

5. The selected Firm will be responsible for determining whether prevailing wages must be paid for construction and development of any element of the Project.

6. The selected Firm, with the assistance of the District, will be responsible for obtaining the required land use entitlements for the Project with the District's cooperation.

7. The selected Firm, with the assistance of the District, will be responsible for obtaining the required environmental approvals for the Project including, but not limited to, hazardous substances investigation, any necessary coordination with the California Department of Toxic Substances Control, and compliance with the California Environmental Quality Act ("CEQA," Public Resources Code section 21000, et seq.).

8. The selected Firm will pay for environmental remediation, if any. A Phase I Environmental Site Assessment has been prepared and Firms may request a copy.

9. The selected Firm is expected to work closely with the City and make a meaningful effort to address City and neighborhood concerns regarding the Project.

10. Where feasible, construction activities for the Project shall not unreasonably interfere with District operations on the Property, if any.

11. In the event a joint occupancy proposal is selected, the Firm will be required to comply with standards for property maintenance, property management, capital replacement reserves, reporting requirements, and other operational requirements.

12. The District in its sole discretion reserves the right to prohibit certain uses of the Premises, regardless of what the City of Huntington Beach, state or current zoning laws allow. Examples may include, but are not limited to, cannabis production, distribution or sales, adult themed operations of any kind, or any use that is harmful to minors.

13. To the extent applicable, the selected Firm shall comply with legal requirements governing construction of school buildings including, but not limited to, the Field Act (Education Code section 17280 et seq.) and submittal of plans for any structure to be utilized by District students to the California Division of the State Architect.

14. The selected Firm must comply with all applicable contractor licensing requirements under state law.

VII. JOINT OCCUPANCY

The requirements set forth in joint occupancy statutes for development of the Premises include, but are not limited to, the following:

1. The term of any lease or agreement shall not exceed ninety-nine (99) years. (Ed. Code, § 17517.)

2. Title to the portion of the building(s) to be occupied by the Firm shall remain exclusively the property of said entity during the term of the ground lease, and title to that portion of the building or facility occupied, or to be occupied by the District shall vest in the District upon completion and acceptance by the District. (Ed. Code, § 17518.)

3. The selected Firm must construct, or provide for the construction of, a building or buildings for the joint use of the school district on the Premises. (Ed. Code, § 17528.)

4. No rental fee or other charge for District's use of a building or a portion of the Project shall be paid by the District. (Ed. Code, § 17518, subd. (a).)

5. The Board has approved a resolution of intention to consider proposals. The Board may select the proposal that best meets the needs of the District. (Ed. Code, §§ 17521-17522.)

6. The District may enter into a lease or agreement with the selected Firm after Board approval of the selected proposal. (Ed. Code, § 17524.)

7. The selected Firm must either file a bond for the performance of the lease or agreement, or an irrevocable letter of credit for the performance of the lease or agreement. (*Id*.) The District will consider other forms of guarantees that would satisfy this requirement and provide protections for the District.

VIII. EXCHANGE

Education Code section 17536 authorizes a school district to exchange its property with another person or a private business firm. Any such exchange may be made on terms and conditions agreed upon by the parties and is not required to comply with other provisions of the Education Code. The exchange must be approved by a two-thirds vote of the governing board, which must identify the properties to be exchanged and specify the terms and conditions of the exchange.

IX. CONTENT OF SOQ

Each Firm's Response must be consecutively numbered on each page and must include the following information, using the following outline structure, except as may be otherwise directed. The Firm's Response shall be **no longer than fifteen (15) pages**, excluding résumés, forms, and pictures, and shall be tabbed according to the numbering system reflected below.

- Responses must be concise, well organized, and demonstrate the Firm's qualifications, and shall be formatted as outlined below:

A. Letter of Interest

A dated Letter of Interest must be submitted, including the legal name of the Firm(s), address, telephone, and the name, title, and signature of the person(s) authorized to submit the Response on behalf of the Firm. The signatory shall be a person with legal authority to bind the selected Firm, and key partners as required for this RFQ/P. NOTE: The signatory must be an employee of the responding entity on the development team that will be providing project financing. The Letter of Interest should identify the development team's primary contact (include address, e-mail address and telephone number) who is responsible for all District queries made during the intake and processing of the response. If proposing joint venture partners and subcontractors, include company name(s), the types of services to be provided by each, and the primary contact for each.

B. Table of Contents

A table of contents of the material contained in the RFQ Response should follow the Letter of Interest.

C. Executive Summary

The executive summary should contain an outline of the Firm's approach, along with a brief summary of the Firm's qualifications.

D. Team Organization Chart

Provide an organizational chart and succinct narrative describing the role and relevant background experience of each of the key individuals who will be involved in implementation of the Project and address the availability of resources, experience and capabilities to assure timely implementation of the Project. Describe overall project management structure and accountabilities.

E. Project Management Design and Construction

For the design and development of the Project, provide a description of the Firm's overall project management structure and a description of the reporting relationships and accountabilities between individuals. Describe the Firm's approach to communications within your team and between your team and the District. This section shall identify the contact person with primary responsibility for the Project, the key personnel proposed to work on the Project, and joint venture partners and subcontractors. The persons listed will be considered committed to the Project with no substitutions without prior agreement.

F. Identify Project Financing

Identify the entity who will be providing specified project financing, as well as any other key members of the development team, including the actual Project lead for day-to-day management of the Project and any other consultants included on the development team at this time (name of individual(s), firm address, e-mail address and telephone number). At a minimum, the submittal shall identify the lead responding firm, joint venture partner firms, and experts in development operations.

G. Development Experience.

1. **Completed Projects.** Provide a minimum of three (3) and a maximum of six (6) development projects which have been completed by the team, including identification and a brief description of each project's square footage, city and street address, construction/completion time frames and dates, and identification and role of the team members in the project. Photographs and/or graphics of projects must be included. Client and public agency references related to these projects shall be included. All projects are to have been completed within the last eight (8) years.

2. **Project Deadlines**. Identify established methods and approaches utilized by your Firm to successfully meet deadlines and provide examples demonstrating effective use of stated methods and approaches.

3. **References**. Provide a minimum of three (3) references knowledgeable of the Firm's projects undertaken (whether still pending or completed) within the last eight (8) years. Educational institutions or other public agency references are preferred. For each reference, please provide a contact person, address, telephone number(s), and email address.

4. **Additional Data**. Provide additional information about the Firm as it may relate to the Firm's Response. This can include letters of reference or testimonials.

5. **Conflicts of Interest**. If applicable, provide a statement of any recent, current, or anticipated contractual obligations that relate in any way to similar work, the Project, or the District, that may be a potential conflict of interest.

H. Legal Issues

Please respond to each of the following questions: :

1. Is there now pending any legal action against the Firm or any employee of the Firm? If so, please describe such pending action.

2. Have there been any settlements or judgments within the last five (5) years? Please describe each such settlement or judgment, including the nature of the action and the amount of recovery.

3. Has the Firm or any of its employees ever been subject to litigation in connection with services or projects similar to the services or projects in this RFQ/P? If the answer is "yes," please describe each litigation including its status.

4. Has the Firm had any contract terminated for cause within the last five (5) years? If the answer is "yes," please describe why the contract was terminated for cause.

X. FINAL PROPOSAL REQUIREMENTS

A. Project

Describe key elements of the Project. Key elements to include where applicable: a detailed description of the residential and/or park usage components, density, location on the Premises, parking allocation, mixed

use design or concept (if any), open space allocation, access points, amenities, any anticipated affordability restriction, and common areas.

Describe the manner in which the Project will benefit the District, development team, and other stakeholders.

Describe the Firm's "Value Proposition" and unique expertise your team brings to the Project.

B. Public-Private Partnerships

Describe the quality, complexity, stability and longevity of the Firm's partnerships with public agencies. Provide specific examples of successfully working on a challenging project with a public entity, and public sector references.

C. Operations Plan and Revenue Generation Opportunities

The following items will be the key criteria by which submissions for this section will be evaluated:

- Overall approach to operating and maintaining the Project.
- Financial capacity of the development team, which forms the basis of the development team's Project.

XI. DISTRICT'S EVALUATION / SELECTION PROCESS

Firms will be asked to provide background on experience, resources, and expertise needed to design and construct a successful Project on time and on budget. Past design and development experience, especially with similar types of projects, will be a critical factor in evaluating the RFQ/P responses. A development team's financial capacity and its ability to provide financing will be important factors in determining the most qualified development team. Key criteria for RFQ/P evaluations will include the following qualifications and experience of the development team:

- Provide the best approach for the Project to support the District's overall objectives as described in this RFQ/P;
- Demonstrate financial ability to provide project financing for the Project; and
- Demonstrate knowledge and experience to successfully design and construct similar types of facilities as those proposed for private use on the District's Property.

The District may select the top ranked development team(s) that meet the minimum qualifications to participate in interviews with staff to discuss their vision, qualifications and Project approach. In the interview step, the District would examine the merits of a development team's qualifications, preliminary vision to support the financial goals and aspirations of the District, and their performance in the interview.

In addition, the top ranked development team(s) may be required to review and comment on a draft term sheet that outlines the key contractual terms and conditions with the District. The District reserves the

right to request a "Best and Final Offer" from the top ranked development team(s), after final RFP submissions are received.

Any award of a contract will be subject to approval by the District's Governing Board.

XII. TERMS AND CONDITIONS

1. The District reserves the right to contract with any Firm responding to this RFQ/P, to reject any Response as non-responsive, and not to contract with any Firm, or any part thereof. The District makes no representation that participation in the RFQ/P process will lead to an award of contract or any consideration whatsoever. The District reserves the right to seek Responses from, or to contract with, any Firm not participating in this process. The District shall in no event be responsible for the cost of preparing any SOQ's.

2. SOQ's submitted will become the property of the District and subject to the California Public Records Act, Section 7920.000 et seq. Those elements in each response that are trade secrets as that term is defined in Civil Code section 3426.1, subdivision(d) or otherwise exempt by law from disclosure and which are prominently marked as "TRADE SECRET," "CONFIDENTIAL," or "PROPRIETARY" may not be subject to disclosure. The District shall not be liable or responsible for the disclosure of any such records including, without limitation, those so marked if disclosure is deemed to be required by law or by an order of the Court. A Firm that indiscriminately identifies all or most of its response as exempt from disclosure without justification may be deemed non-responsive. In the event the District is required to defend an action on a Public Records Act request for any of the contents of a response marked "TRADE SECRET," "CONFIDENTIAL," or "PROPRIETARY" the Firm agrees, by submission of its response for the District's consideration, to defend and indemnify the District from all costs and expenses, including attorneys' fees, in any action or liability arising under the Public Records Act.

3. The selected Firm(s) and each of its (their) sub-consultants and/or co-venture partners, shall comply with all applicable federal and California laws, including, but not limited to, Title VII of the Civil Rights Act of 1964, as amended, Executive Orders 11246, 11375, and 12086, the California Fair Employment and Housing Act beginning with Government Code section 12900, Labor Code section 1735, and any other applicable federal and state laws and regulations hereinafter enacted, including the Federal Americans with Disabilities Act (ADA). Firms shall be responsible for establishing and implementing an ADA program within the Firm's workplace. Firms shall not discriminate against any prospective or active employee based on race, religious creed, color, national origin, ancestry, physical disability, mental disability, medical condition, genetic information, marital status, sex, gender, gender identity, gender expression, age, sexual orientation, or military and veteran status. The selected respondent shall cause the above provisions to be inserted in all subcontracts for any work covered by this RFQ/P so that such provisions will be binding upon each sub-consultant.

4. The District reserves the right to amend this RFQ/P by means of addenda.

Exhibit A

Address	7721 Juliette Low Drive, Huntington Beach, CA 92647
APN	Assessor's Parcel Number 142-111-04
Size	13.8 acres
Previous Use	Preparatory Preschool and Elementary School
Buildings	Administrative and classroom buildings, cafeteria, support spaces, gymnasium
Access	Primary vehicular access to the Property is provided via Sher Lane, with additional access available from surrounding neighborhood streets. The Property is located West of Beach Boulevard, a major north–south arterial, and north of Heil Avenue, a primary east–west arterial roadway. The Property is also located in proximity to regional transportation facilities, including the San Diego (405) Freeway.
Utilities • Electric • Gas • Sewer/Storm • Water	 Yes Yes Yes Yes
Local Government	City of Huntington Beach

SUN VIEW

7721 JULIETTE LOW DR
HUNTINGTON BEACH, CA 92647

Welcome Public User to the OCPW Public map!!

Layers

Tools

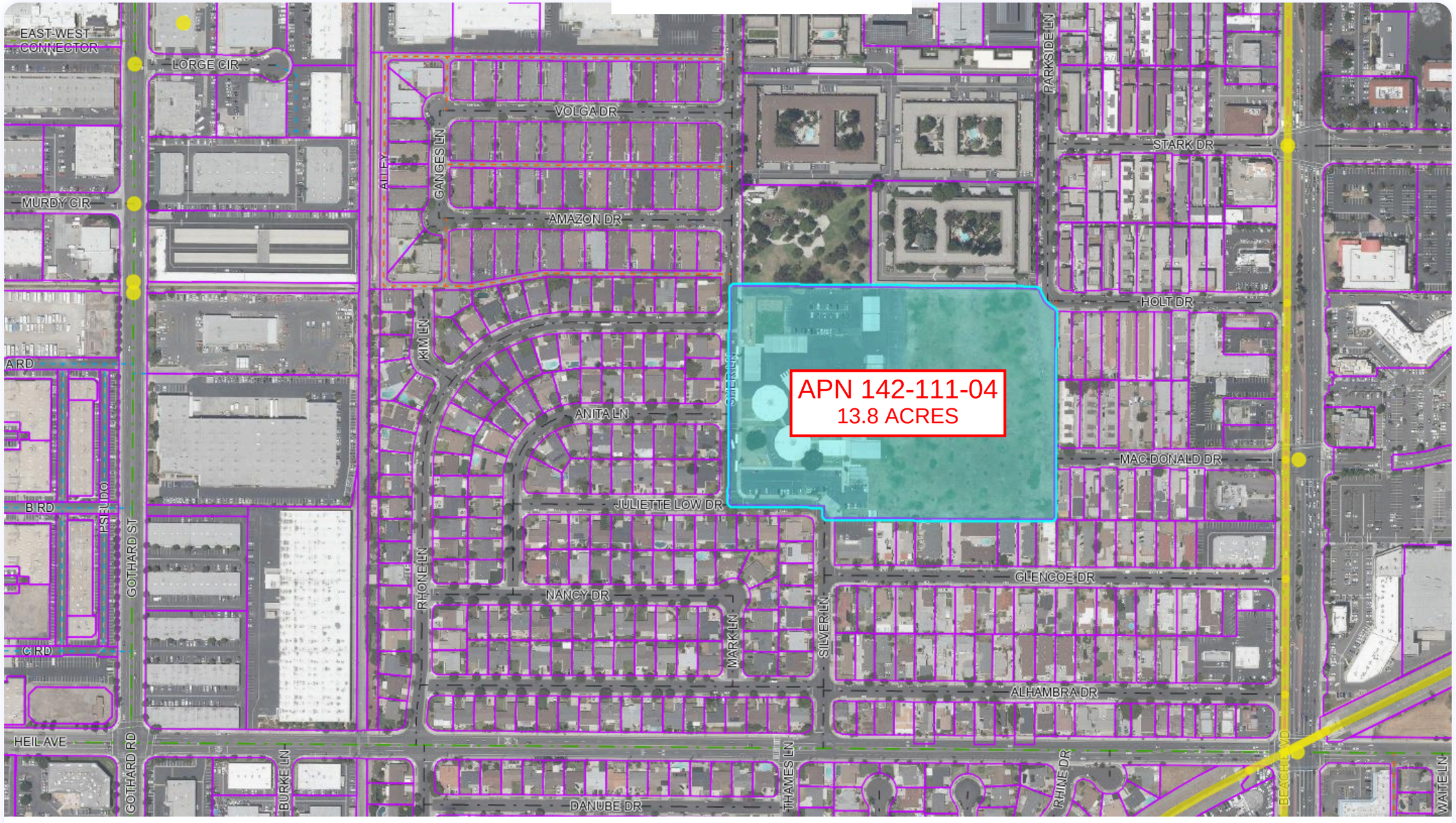
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Selection

Tutorials

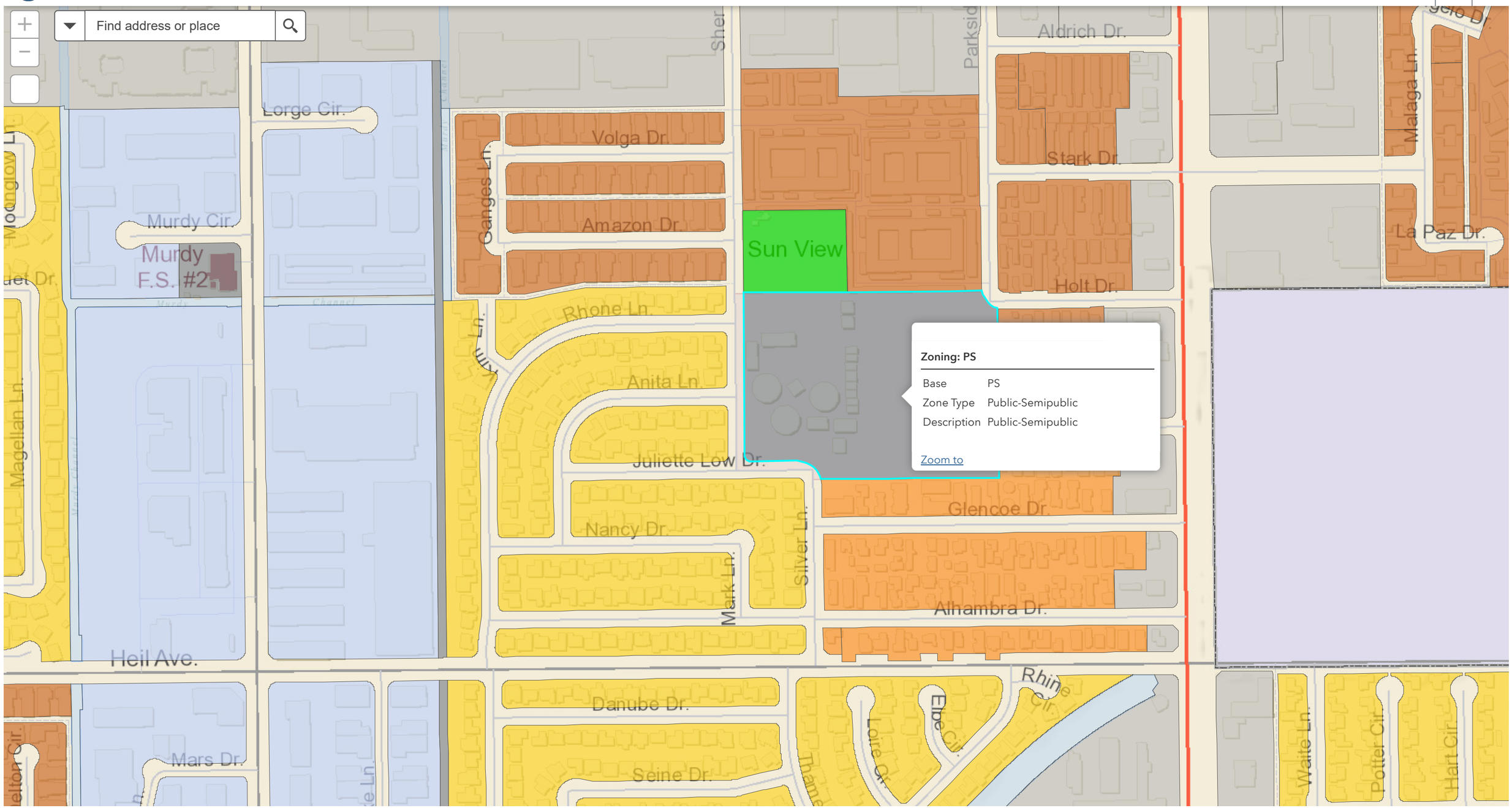
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ver. 1



XY

City of Huntington Beach Zoning

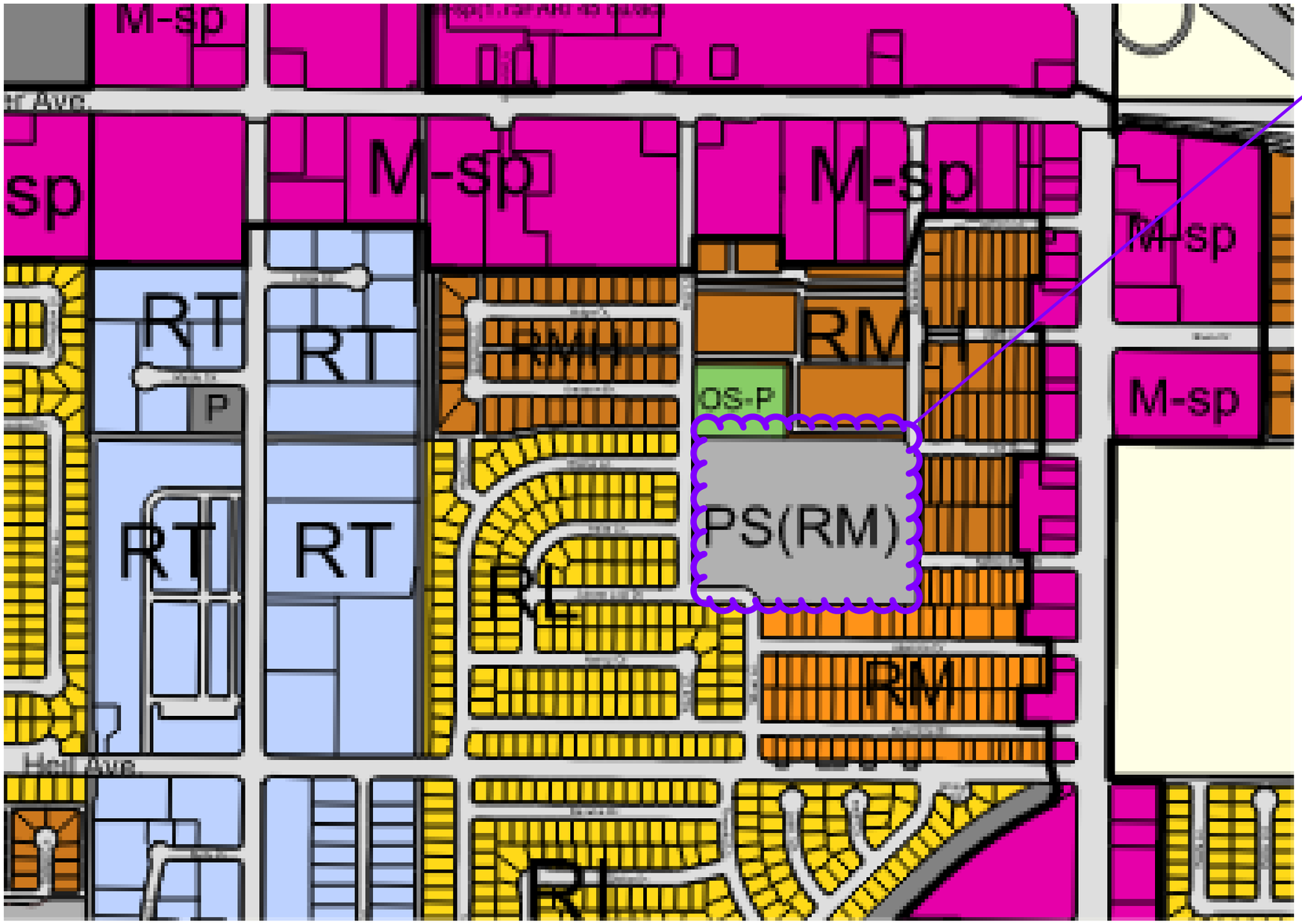


300ft

-117.993 33.725 Degrees

General Plan

City of Huntington Beach



SUN VIEW

General Plan Designations

Density/FAR range for each designation as noted in the legend below or as otherwise designated on the map or by Specific Plan.

Residential

- RL — Low Density (max 7 du/ac)
- RM — Medium Density (max 15 du/ac)
- RMH — Medium High Density (max 25 du/ac)
- RH — High Density (>30 du/ac)

Commercial

- CN — Neighborhood (max 0.35 FAR)
- CG — General (max 1.5 FAR)
- CV — Visitor Serving (max 0.5 FAR)
- CO — Office (max 1.0 FAR)

Industrial

- I — Industrial (max 0.75 FAR)
- RT — Research and Technology (max 1.0 FAR)

For more information call the Community Development Department at (714) 536-5271

Mixed Use

- M — Mixed Use

Open Space

- OS-C — Conservation
- OS-P — Park
- OS-R — Recreation
- OS-W — Water Recreation
- OS-S — Shore

Specific Plan

- -sp — Specific Plan Overlay
- -mu — Mixed Use Overlay

Public

- P — Public
- PS — Public/ Semipublic (underlying designation)