



Workforce Housing Development Feasibility Study & Advisory Services

PROPOSAL FOR RFP #728 / JUNE 4, 2026



**BRAILSFORD
& DUNLAVEY**

INSPIRE. EMPOWER. ADVANCE.

ATTACHMENT 1

PROPOSAL FORM

This Proposal Form must be duly executed and submitted with any proposal to OUHSD.

The Offeror hereby agrees that its proposal is subject to all **RFP #728 WORKFORCE HOUSING DEVELOPMENT – FEASIBILITY STUDY & ADVISORY SERVICES** provisions, terms and conditions, attachments, exhibits, amendments and other applicable materials which are attached or incorporated by reference. Proposer hereby agrees to promptly enter into an agreement in substantial accordance with such RFP provisions, terms and conditions.

The Offeror hereby agrees that its attached proposal of which this is part, is a firm irrevocable offer and valid for acceptance by OUHSD for the period through and including 6/30/2027. The Offeror hereby agrees that if its proposal is accepted by OUHSD that it shall provide the requested services in accordance with the RFP, as it may be amended. The term of this contract shall be for a period of one (1) year. Services requested must be completed within this term.

Services Fee \$ 163,000
(not to exceed) for Fiscal Year 2026-2027 ending June 30, 2027

Name of Person Duly Authorized to Execute this Proposal/Offer:

Duly Authorized Signature: 

Title: President Date: 6/4/2026

Offeror Name: Brailsford & Dunlavey, Inc.

Offeror Address: 575 Anton Blvd., Suite 670, Costa Mesa, CA 92626

Offeror Telephone: 202-255-5893

Offeror Email: jturner@bdconnect.com

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A

COVER LETTER AND EXECUTIVE SUMMARY

- ☑ 2 pages maximum.
- ☑ Brief introduction including firm overview, statement of interest, and summary of relevant qualifications.
- ☑ Included in this introduction, the firm must provide a timeline in which the services will be completed.



Brailsford & Dunlavey, Inc.
523 W. 6th Street, Los Angeles, CA 90014
phone 213.377.5522

June 4, 2026

Ms. Deanna Rantz
Director of Purchasing
Oxnard Union High School District
1800 Solar Drive
Oxnard, CA 93030
Via: Deanna.Rantz@oxnardunion.org

Dear Ms. Rantz and Selection Committee Members,

Brailsford & Dunlavey (“B&D”) welcomes the opportunity to present this proposal to provide workforce housing and development advisory services to the Oxnard Union High School District (“OUHSD” or the “District”) supporting its initiative to utilize District owned property and deliver affordable, workforce housing to the teachers and staff in your community. B&D has been working with similar educational institutions and municipalities across the country, planning solutions for this very issue, with clients such as the Los Angeles Unified School District (“LAUSD”), Novato USD, Newark USD, Metro State Denver, CSU Channel Islands, and the County of Santa Barbara just to name a few. We have partnered on this opportunity with RRM Architects (“RRM”), an architectural and engineering firm with extensive housing expertise as well as planning and design in the local Oxnard/Camarillo/Ventura County market.

As experts in strategic planning, collectively focused on people, places and partnerships, we are particularly excited by the opportunity to work with OUHSD to engage in the transformative thinking that will ensure proper stewardship of your real estate assets and provide you with implementable, sustainable, and successful housing options that are more affordable for your teachers and staff. This initiative will not only allow the District to attract and retain a qualified and professional, workforce, reduce stress and support the mental health of its employees, reduce environmental impacts and allow its workforce to live and work in the communities they serve, but will generate positive educational outcomes for students and families.

We understand, like many communities throughout California, the teachers, staff and families of OUHSD have found it increasingly difficult to secure affordable housing in their community. Wages have not kept pace with the rapidly increasing price of homes and rental housing in the area. Over the past 10 years, home and rental prices have virtually doubled in cost while wages have only increased by approximately 25%. As a result many employees are housing burdened, spending more than 30% of their take home pay on housing.

A 2023 survey of OUHSD employees found that 53% do not own a home, 35% of renters share a residence or room with others, and 47% or those surveyed spend more than 40% of their wages on rent. The lack of affordable housing in the region puts an enormous strain on employees and their families, resulting in a challenge to the District to attract and retain qualified staff to support its educational mission. The Board has taken the appropriate steps to initiate a workforce housing plan to address these mission critical issues and B&D welcomes the opportunity to partner with the District to develop solutions to ensure OUHSD can continue to support its workforce and ensure positive student outcomes.

Our unique experience allows us to provide value to OUHSD in numerous ways:

- 1. We know K12 education, the development of affordable housing projects, and public private partnerships (“P3s”).** Combining our collective expertise in K12 educational infrastructure and planning with innovative, public private partnerships, we specialize in delivering sustainable, high-quality, affordable, housing projects that anchor communities and support student success. We have provided affordable housing planning and support services to more than 60 clients.

2. **We are experienced experts in aligning initiatives with the mission of the institution, creating value for our partners.** The B&D team is an unbiased, third-party advisor, committed to maximizing your assets and investments. We do not compromise your interest by serving as a broker or developer, and we do not prefer one financing structure over another. We are here to serve your needs and inspire you to achieve outcomes that align with your mission and goals.
3. **We know Southern California and are ready to begin immediately.** With offices in Los Angeles and Orange County, and with the inclusion of RRM Architects, with offices in Santa Barbara, we are deeply rooted and experienced in Southern California, delivering trusted service to our local community. Our dedicated team brings unparalleled regional expertise right to your doorstep.

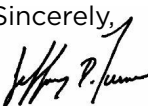
B&D conducts and publishes research on the state of the housing P3 market, including our Annual P3 State of the Industry Report, providing valuable insights to the industry.

Our team is led by Al Grazioli, Vice President and a leader of our workforce housing and real estate services platform. Based in Los Angeles, Al was responsible for the workforce housing program for LAUSD, one of the earliest such programs in California, and successfully delivered 185 units of employee housing on three sites for K12 educators and staff. Supporting Al and our B&D team will be RRM Architects. RRM has extensive experience not only with housing in general, but with the planning and design of workforce housing for K12 districts locally. In addition, RRM has extensive experience in residential planning and design in the Oxnard/Venture submarket and was the architect for the Somis Ranch Farmworker housing project adjacent to the high school. B&D and RRM will work together to ensure that the options developed for the site will not only meet or exceed the expectations and goals for the District but will accommodate the potential relocation of school facilities and maximize the likelihood of project approvals while ensuring compliance with applicable regulations.

Proposed Timeline

The schedule we have proposed reflects our ability to begin work as a team immediately on July 1, and enable us to make data- and experience-driven recommendations for next steps to the Board within five (5) months. With timely decision making by leadership, a well-coordinated community engagement plan, and in partnership with B&D as a highly qualified and trusted advisor, we will deliver an implementable and financially viable plan of action that will enable OUHSD to go to the development and investment community with a Request for Qualifications and then a Request for Proposals for a housing solution that addresses the needs, goals, and mission of the District by the end of 2026.

We sincerely appreciate the opportunity to submit this proposal to OUHSD. We are enthusiastic about the opportunity to partner with you to implement this mission critical work which will position the District teachers, staff, students and community for long-term success. We look forward to the opportunity to work together with you and your leadership. If you have any questions, feel free to contact Al Grazioli, Vice President, at (626) 688-7718 or agrazioli@bdconnect.com.

Sincerely,


Jeffrey Turner, LEED AP
President

B

FIRM PROFILE AND TEAM QUALIFICATIONS

- ☑ 8 pages maximum.
- ☑ Firm location, history, size, and areas of expertise.
- ☑ Org Chart for key team members and project consultants.
- ☑ Key team members with relevant experience.



Brailsford & Dunlavey leads the planning, development, and management of the places that shape and strengthen our communities. As a trusted partner, we empower clients to ask the right questions and develop solutions that achieve their bold visions.

About Brailsford & Dunlavey

Since 1993, B&D has been a leader in implementing creative solutions for communities to grow and maximize the value of their physical and operational assets.

With over 2,000 projects in our portfolio, our wealth of experience means that we are sought out by education and municipal clients of all sizes, including the ones driving trends and best practices. Our advisory solutions shape the social infrastructure of our communities. We advise local governments and education clients in the context of market responsive concepts and land use, public and private funding, community input, local contracting, permitting and approvals, construction oversight, and all other questions stakeholders face.

In late 2025, B&D and Project Management Advisors (PMA) merged, bringing together two nationally recognized leaders in program management and real estate advisory services to form an organization with broader capabilities across project lifecycles.

We have been trusted to advise on more than \$75 billion in completed construction value. That includes over \$13 billion within the P3 sector on projects ranging from student and workforce housing and mixed-use developments to P3 energy infrastructure.

B&D has 14 offices across the country with 400+ employees—and features a client base in all 50 states.

AS WE SEE IT...

The State of Affordable Workforce Housing

...Workforce housing continues to be a hot topic across the country. For many communities, affordable housing continues to be a challenge as limited supply has pushed employees further out of central areas. Employee salaries have not kept up with rising housing prices in many markets. In its June 2021 press release announcing Housing is Critical Infrastructure: the National Association of Realtors stated that “The state of America’s housing stock...is dire, with a chronic shortage of affordable and available homes [needed to support] the nation’s population.”

...No one size fits all when it comes to workforce housing. In recent years, many organizations and municipalities have decided to use private partners to support their growing housing needs.

...We have seen unit types ranging from four-bedroom apartments to micro units, and everything in between. A few of the projects have included more co-living type configurations, encouraging people to live together in a more community-oriented type development.

Areas of Expertise

- Planning & Development Advisory Services
- Program Management Services
- Communications & Public Engagement

-Management Advisory Services

Locations

Washington, DC (HQ)
Northern California
Southern California
11 additional locations

60+

WORKFORCE HOUSING
ADVISORY PROJECTS

200+

P3 DEVELOPMENT
ADVISORY PROJECTS

\$75B+

COMPLETED
CONSTRUCTION

\$13B+

P3 REAL ESTATE
DEVELOPMENT



RRM Design Group

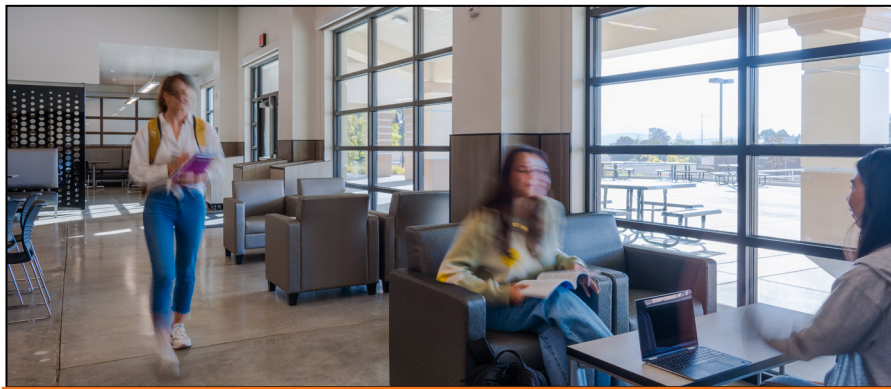
50 Years of Creating Environments People Enjoy

We love being a 100% employee-owned design firm, and we plan on doing this for the next 50 years

All of us at RRM thrive on our passion for crafting enjoyable environments, a commitment that has fueled our success for fifty years. From the inception of our journey to our current state of expansion, our team of architects, landscape architects, engineers, surveyors, and planners collaborates closely with clients to shape our communities. Whether the project is public or private, commercial or residential, we excel in attentive listening, thoughtful design, and timely, budget-conscious delivery—values we've upheld since our establishment in 1974.

We want to be known as friendly, helpful, and collaborative design professionals

We feel that this client quote sums up the experience of working with RRM: ***"RRM was equally attentive and responsive to issues both large and small, real and imagined. I was consistently impressed with their calm, informed manner and attention to details."***



We're doing an incredible amount of work:

2,300+

RRM projects in the last decade

Our clients enjoy the experience of working with us:

8.5 NPS

(Overall Net Promoter Score) well above AEC industry average of 7.2

Our employees like their careers at RRM:

"Best Firm to Work for"

2022, 2023, 2024, 2025
- Zweig Group



RRM by the Numbers

7 RRM Offices

Our headquarters are located at:

3765 South Higuera St., Ste. 102
San Luis Obispo, CA 93401
p: (805) 543-1794

All offices: San Luis Obispo, Santa Barbara, San Juan Capistrano, San Leandro, Ventura, San Diego, and Seattle

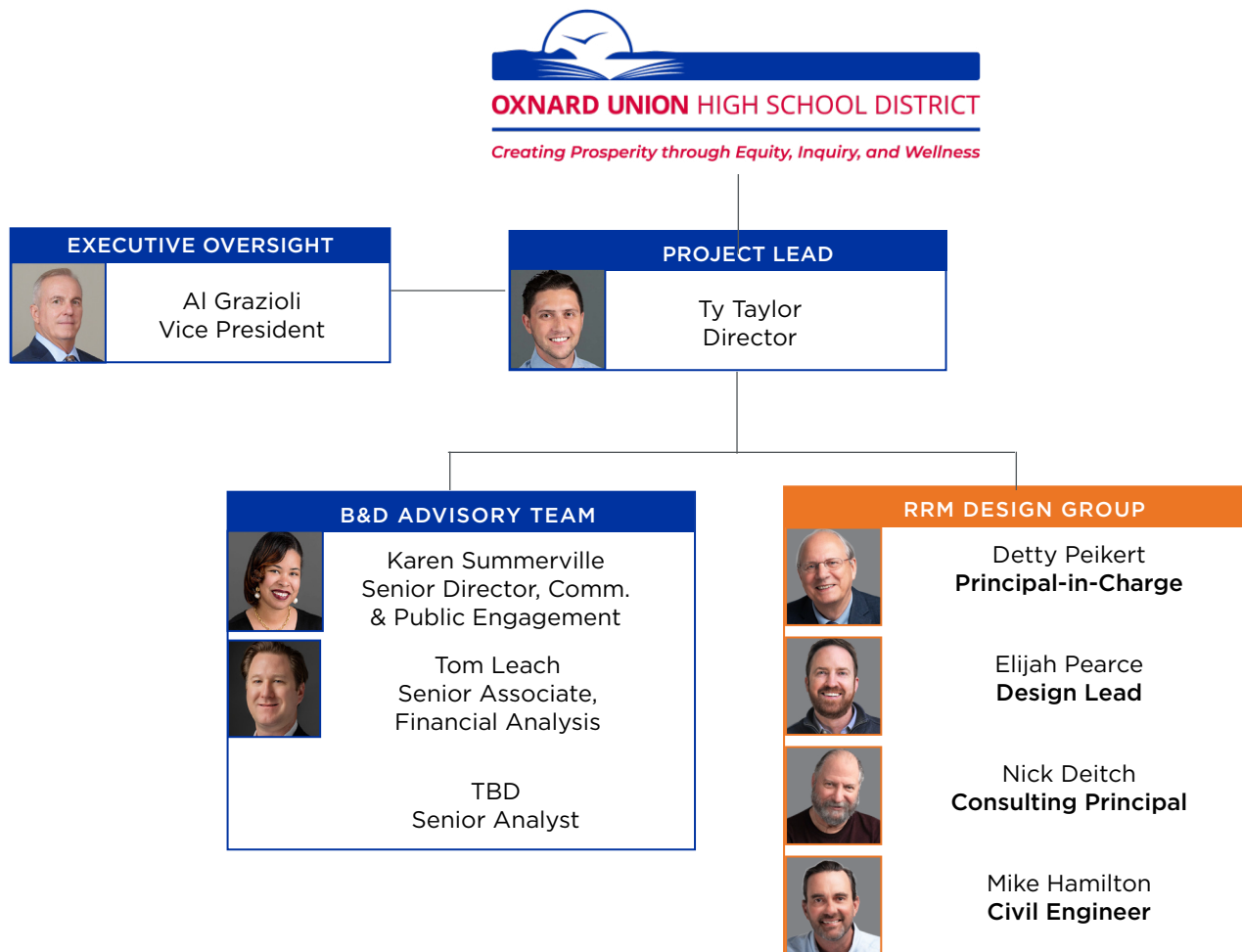
200+ Employees in 6 Disciplines

- Architects
- Civil Engineers
- Landscape Architects
- Planners & Urban Designers
- Structural Engineers
- Surveyors

100% Employee-Owned Firm

RRM Design Group is a California corporation and a 100% employee-owned company (ESOP), incorporated November 26, 1974

Organizational Chart



PERSONNEL	CONTRIBUTION TO THE OUTCOMES
EXECUTIVE OVERSIGHT Al Grazioli	› Provides overall strategic direction and senior-level oversight › Ensures alignment between District objectives and B&D's advisory approach
PROJECT LEAD Ty Taylor	› Serves as the day-to-day lead, coordinating all aspects of the engagement › Drives the work forward, ensuring deadlines and deliverables are met › Translates strategic direction into clear, actionable steps for the team
B&D ADVISORY TEAM Karen Summerville Tom Leach Senior Analyst (TBD)	› Provide CPE subject-matter expertise and guidance › Conduct research, analysis, and financial modeling to inform recommendations › Support the Senior Associate with high-quality deliverables and insights › Help build shared understanding of process and outcomes with the OUHSD community
RRM DESIGN GROUP Detty Peikert Elijah Pearce Nick Deitch Mike Hamilton	› Work alongside the team to provide creative and sustainable workforce housing solutions



Al Grazioli

VICE PRESIDENT

EDUCATION

B.A. Political Science, Rice University

CERTIFICATIONS

California Real Estate Broker

PRESENTATIONS/PUBLICATIONS

2026 “Strategic Asset Management for Educators” - *Coalition for Adequate School Housing (CASH) School Facilities Leadership Academy*

2025 “Using P3s to Support Strategic Asset Planning, Portfolio Optimization, and Development of Educational Assets” - *USC Real Estate Law and Business Forum*

2025 “A practical guide to initiating an affordable housing plan for school districts” - *The B&D Perspective*

2024 “Providing homes, building futures, enhancing educational outcomes” - *The B&D Perspective*

2024 CASH Conference, Educational Workforce Housing, Technical Challenges and Strategies from the Field, Expert Panelist

2023 CASH Conference, Focus on Education Workforce Housing in California: Developing the 21st Century Campus to Sustain Communities, Expert Panelist

PROFESSIONAL BACKGROUND AND HIGHLIGHTS

- › Works closely with clients to address challenges and develop initiatives to evaluate, repurpose, and identify the highest and best use and resulting value of underutilized educational assets to support the goals and mission of the institution
- › 30+ years of extensive expertise in surplus land and resource management—including in workforce and affordable housing, real estate asset strategies, and educational facility development—delivering transformative outcomes for major corporations, K-12 districts and higher education institutions
- › Expert in real estate deal structuring and negotiations; was head of corporate real estate for major corporations such as Amgen and DreamWorks SKG, evaluating and developing real estate assets globally and negotiating lease and sale agreements with landlords and governments
- › Developed \$1.7+ billion of K-12 facilities, new, renovated, and expansion wellness clinics with project values of \$75 million, as well as a research and nursing facility for a college
- › Prior to B&D, served as LAUSD’s Director of Real Estate and Business Development, where he led facilities, real estate, and asset management for the second-largest school district in the nation; managed complex lease and joint-use agreements, multi-family housing projects, developed medical clinics, and led the district’s initiative to provide more affordable housing for employees and families

SELECT PROJECT EXPERIENCE

Novato Unified School District

- › Real Estate Development Advisory Services—30 acres of Surplus Property

Newark Unified School District

- › Workforce Housing / Teacher Housing Planning
- › Property Entitlements

Santa Barbara County, CA

- › P3 Development Advisory Services

Sage Park Apartments (Gardena, CA)*

- › Affordable Housing Development

Norwood Learning Village (Los Angeles, CA)*

- › Affordable Housing Development

Selma Community Housing (Hollywood, CA)*

- › Affordable Housing Development

Los Angeles Unified School District*

- › Director of Real Estate and Business Development
- › Head of facilities real estate and asset management

**Previous experience*



Ty Taylor, ALEP

DIRECTOR

PROFESSIONAL BACKGROUND AND HIGHLIGHTS

- › Has managed the design and development of over \$1B in capital projects including educational facilities, and municipal parks and recreation facilities
- › Portfolio of planning work includes approximately \$30 billion in long-term capital programs, capacity and school utilization planning, and district-wide master planning across the U.S.
- › Appointed to Commissioner of the Association for Learning Environments Accredited Learning Environments Planner certification program

EDUCATION

M.Arch.,
North Dakota State University

B.S. Environmental Design,
North Dakota State University

American Sign Language
Minnesota State Community and
Technical College

CERTIFICATIONS/AFFILIATIONS

Commissioner of the Accredited
Learning Environment Planner
(ALEP) designation from
the Association for Learning
Environments

Accredited Learning Environment
Planner (ALEP)

National Council of Architectural
Registrations Boards (NCARB)

Board President of the Association
for Learning Environments –
Southwest Region

ARE Licensure Candidate

PUBLICATIONS/PRESENTATIONS

2023 – “The Intersection of
Architecture & Maslow’s Hierarchy of
Needs in the Design of Individual and
Private Restrooms – The Association
For Learning Environments

2023 – “Where is the Bathroom – For
Everyone” – The Association For
Learning Environments

2020 — Panel Presenter “The
Homeless Student Crisis: A Panel
Discussion with the Affected”

2020 — Panel Presenter “Bond
Management in a Virtual World: What
the Pandemic Has Taught Us”

SELECT PROJECT EXPERIENCE

Novato Unified School District

- › Workforce Housing / Teacher
Housing Planning
- › Property Entitlements

Newark Unified School District

- › Workforce Housing / Teacher
Housing Planning
- › Property Entitlements

UC Law San Francisco

- › Student and Workforce Housing
Financial Analysis

Oakland Unified School District

- › Program Director, Program
Management Services

San Jose Evergreen Community College District

- › Program Management Services

Redwood City School District

- › Program Management Services

North Orange County Community College District

- › Multi-campus Educational and
Facilities Master Plan

Alexandria City Public Schools

- › School Office Relocation Program
Management
- › Long-Range Facilities Plan
- › New School Program
Management- Jefferson Houston
School

District of Columbia Public School

- › Modernization Program, Capacity,
and Swing Space planning

Gallaudet University

- › Student Housing Program
Management
- › Faculty Housing and
Administrative Space Renovations
Program Management

Saint Bonaventure University

- › Property Yield Analysis - Highest
and Best Use Study

Western Pennsylvania School for Blind Children

- › Deaf and Blind Design Expert
- › Property Use Consultant



Karen Summerville

SENIOR DIRECTOR, CPE PRACTICE GROUP

PROFESSIONAL BACKGROUND AND HIGHLIGHTS

- › Leads a growing Communications and Public Engagement (CPE) practice group that maximize clients' ability to foster meaningful connections with communities
- › Portfolio of project work includes strategic communication and engagement planning of over \$4B in capital programs and planning initiatives across the U.S. with expertise in strategic communications planning and implementation, brand development and application, social media management, and engagement planning

SELECT PROJECT EXPERIENCE

Oakland Unified School District

- › Communications Plan Development, Engagement Strategy Development, Major Public Event Planning and Management, Technical Supports

Redwood City School District

- › Communications Plan Development, Technical Supports, Major Public Event Planning

San Jose Evergreen Community College District

- › Program Reporting, Technical Supports, Public Event Planning

Monterey Peninsula College

- › Stakeholder Analysis Development, Brand Coordination, Website Development Management

EDUCATION

Studied Integrated Design M.F.A.,
University of Baltimore

B.F.A. Communications,
Morgan State University



Thomas Leach

SENIOR ASSOCIATE

PROFESSIONAL BACKGROUND AND HIGHLIGHTS

- › Advisor in B&D's Southern California office with over 18 years of experience in real estate development, particularly as it relates to mixed-use and multifamily housing in southern California
- › Expertise in project management, asset management, construction management, and project financing

SELECT PROJECT EXPERIENCE

Los Angeles Unified School District

- › Employee and Family Affordable Housing Advisory Services

State Center CCD/Fresno City College

- › Affordable Student Housing Development/P3 Advisory Services

University of San Diego

- › Housing P3 Development Advisory Services and Rental Rate Analysis

The Flat*

- › 205-unit multifamily value-add conversion of hotel into studio apartments and amenity spaces

121 W. 3rd Street Multifamily*

- › Oversaw acquisition of multiple parcels in LA for a 15-story, 331-unit multifamily project

**work prior to B&D*

EDUCATION

MBA,
University of Southern California

B.S. Mechanical Engineering,
Tufts University



Detty Peikert AIA, LEED AP

PRINCIPAL-IN-CHARGE

As a principal at RRM, Detty Peikert brings over three decades of architectural experience to the firm. His diverse expertise spans all avenues of architecture; from residential housing design to project management and real estate development. A general partner in several development partnerships, Detty has extensive experience in developing affordable and market rate housing.

Licenses and more

- Architect, CA, C15008
- Leadership in Energy and Environmental Design Accredited Professional (LEED AP) -
- American Institute of Architects (AIA), Santa Barbara Chapter, Past President of the Board of Directors; Current Member (No. 0048365); Santa Barbara Advocacy Committee, Co-Chair
- Coastal Housing Coalition, Advisory Member
- Garden Court Foundation, Board Member
- Vista Riviera Real Estate (formed to develop employee housing for Cottage Hospital), Board Member

Detty's featured project experience

- 117 East Carrillo Workforce Housing Planning and Design Services, Santa Barbara
- 13-21 South Soledad Affordable Housing (Pearl Gardens), Santa Barbara
- 2800 Barry Street Affordable Housing Development (Vista Campana), Camarillo
- Casa de las Fuentes Affordable Housing Development, Santa Barbara
- Casas las Granadas Affordable Housing, Santa Barbara
- Garden Court II Affordable Senior Apartments (Gardens on Hope), Santa Barbara
- Golden Inn and Village Affordable Senior and Multi-Family Development, Santa Ynez
- Grace Village Affordable Senior Apartments, Santa Barbara
- Heritage Ridge Affordable and Senior Housing, Goleta
- Jardin de las Rosas Affordable Multifamily Housing (Haley-Salsipuedes), Santa Barbara



Elijah Pearce LEED AP

DESIGN LEAD

With over a decade of architectural experience, Elijah Pearce brings an expansive skillset to RRM Design Group. From commercial and residential developments to public facility and educational spaces, Elijah's projects range in size and type. He works alongside clients and stakeholders throughout the process. With detailed renderings and sketches, Elijah brings each client's vision to life. Both his artistic and technical skillset makes him one of RRM's most valued architects.

Education

- Bachelor of Architecture, University of Notre Dame, IN

Licenses and more

- Architect, CA, C34994
- Leadership in Energy and Environmental Design Accredited Professional (LEED AP)
- Rising Star in Architecture, 2023 Zweig Group

Elijah's featured project experience

- 711 North Milpas Street Mixed-Use Development, Santa Barbara
- 835 East Canon Perdido Street Multifamily Housing, Santa Barbara
- 1818 Castillo Street Apartments, Santa Barbara
- Arlington Village Apartment Community, Santa Barbara
- Arrowhead Grove Apartments Affordable Housing, San Bernardino
- Day Creek Villas Senior Housing, Rancho Cucamonga
- Gardens on Hope Affordable Senior Apartments, Santa Barbara
- Garden Estates Apartments and Townhouses, Ventura
- Grace Village Affordable Senior Apartments, Santa Barbara



Nick Deitch AIA

CONSULTING PRINCIPAL

With four decades of architecture and urban design experience, Nick Deitch brings an artistic eye to all projects he's a part of. His extensive portfolio spans across the public and private sector; from community planning and historic restoration to adaptive re-use and mixed-use infill projects. The former president of Turning Point Foundation nonprofit, Nick's also a strong proponent for inclusive and affordable housing solutions. His passion for inclusive and creative design guides much of his work.

Education

- *Bachelor of Architecture, , California Polytechnic State University, San Luis Obispo, San Luis Obispo, CA*

Licenses and more

- *Architect, CA, C17481*
- *American Institute of Architects (AIA), Member*

Nick's featured project experience

- 1216 East Santa Clara Street Housing Authority Construction Documents and Design Development
- 1216 East Santa Clara Street Housing Authority Entitlements, Ventura
- 4300 Telegraph Road Affordable Housing Entitlement Phase, Ventura
- Fillmore Terrace Affordable Housing Apartments, Fillmore
- Laurel Courts Mixed-Use Entitlements, Ventura
- Lewis Road Mental Health Rehabilitation Center Building Design Development and Construction Document Phase, Ventura
- Multisite Santa Barbara Housing Rehabilitation, Santa Barbara



Mike Hamilton PE, QSD/P

CIVIL ENGINEER

Mike is an RRM principal and the manager of engineering for the Santa Barbara office with over 20 years of experience in both the public and private sectors. At RRM, he is involved in the mentorship program and is also the principal of the sustainability committee. Mike is a leader in the ever-changing field of stormwater management, specializing in designing and implementing Best Management Practices, wastewater management, and land development.



Education

- *Bachelor of Science, Civil Engineering, California Polytechnic State University, San Luis Obispo, San Luis Obispo, CA*

Licenses and more

- *Professional Engineer, CA, 62696*
- *CA Certified Qualified Stormwater Pollution Prevention Plan Developer & Practitioner(QSD/P)*
- *American Council of Engineering Companies (ACEC), Member*
- *American Society of Civil Engineers (ASCE), Member*

Mike's featured project experience

- Lompoc Unified School District Housing Development Site Assessment and Feasibility Study
- 711 North Milpas Street Mixed-Use Development (Capitol Hardware), Santa Barbara
- 835 East Canon Perdido Street Multifamily Housing, Santa Barbara
- Carpinteria Unified School District Bailard Avenue Workforce Housing
- El Verano Affordable Senior Housing Construction Documents, Anaheim
- Gardens on Hope Senior Apartments, Santa Barbara
- Garden Estates Apartments and Townhouse, Ventura
- Grace Village Affordable Senior Apartments, Santa Barbara
- Johnson Court Veterans Transitional Housing, Santa Barbara

C

RELEVANT PROJECT EXPERIENCE

- ☑ 10 pages maximum.
- ☑ Detailed descriptions of similar workforce housing or affordable housing projects.
- ☑ Specific experience with California school district projects.
- ☑ Examples of completed projects currently in operation.
- ☑ Client references with contact information for each project.



Los Angeles Unified School District

AFFORDABLE WORKFORCE & FAMILY HOUSING ANALYSIS AND ADVISORY SERVICES

LOS ANGELES, CA

CLIENT OPPORTUNITIES

- › Establish key strategic drivers and decision-making criteria related to the development of affordable employee and family housing
- › Advise on the scale and scope of potential projects for the District to develop to respond to housing needs in the high cost LA Metro area
- › Develop a series of recommendations towards an implementable plan

B&D APPROACH

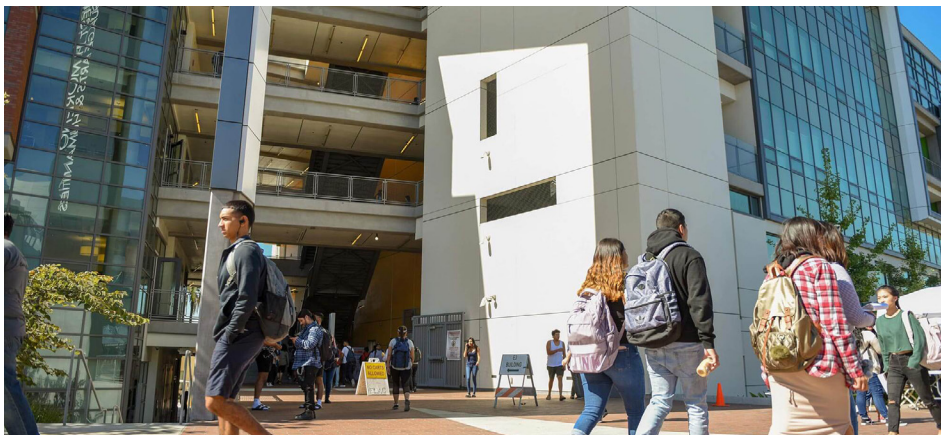
- › Developed key decision-making criteria related to prioritization, options, and operational considerations for potential housing across the District
- › Analyzed data from a survey sent to more than 75,000 LACCD employees and 15,000 families experiencing houselessness or housing insecurity
- › Organized focus groups with employees, families, and stakeholders to qualitatively understand living experiences, housing burdens, perceptions of the Los Angeles housing market, and potential impacts of housing on academics and work performance
- › Established demand for District-affiliated housing across all regions of the District

PROJECT OUTCOMES

- › Identified **greater need for employee and family housing than could be developed** through District real estate resources
- › Created a **prioritization model** for employee groups addressing District needs
- › Identified **key services and amenities** that should be integrated into future housing projects
- › Positioned LAUSD to **advance to further analysis of District-owned sites and development opportunities**

CLIENT REFERENCE

Mr. Mark Borison
Director of Real Estate and
Business Development
p 213-241-6124
e mark.borison@lausd.net



Los Angeles Community College District

AFFORDABLE HOUSING STRATEGIC PLANNING, ANALYSIS, AND MASTER PLANNING

LOS ANGELES, CA

CLIENT OPPORTUNITIES

- › Advise on the projected need of its students and workforce for affordable housing as part of a proposed \$5 billion construction bond
- › Establish key strategic drivers and requirements for the development and operation of student housing across the District
- › Develop physical master plans for the development of housing on three colleges within the District (planning work completed by Steinberg Hart)

B&D APPROACH

- › Analyzed data from a survey sent to more than 109,000 LACCD students and 7,500 employees
- › Organized focus groups for students, faculty, and staff to qualitatively understanding living experiences, housing burdens, perceptions of the Los Angeles housing market, and potential impacts of housing on academics and work performance
- › Developed key decision-making criteria related to options and operational considerations for potential housing across multiple sites within the District
- › With partner Steinberg Hart, created physical plans in alignment with campus master plan documentation identifying housing scope, scale, and program for LA City College, Pierce College, and West Los Angeles College
- › Presented and refined options for development and operation with campus leadership and working committee

PROJECT OUTCOMES

- › Identified **greater need for housing than the District could accommodate** through its own resources
- › **Recommended three sites for development** on three District campuses to **maximize capture rates and align with specific college strategic vision**
- › Created **unique programs** and responding **conceptual design** for facilities to meet the unique needs of LACCD students in affordable housing
- › Determined **project and operational costs** for each concept and the extent of Measure LA bond support
- › Positioned LACCD to **effectively begin implementing** the projects upon approval

CLIENT REFERENCE

Ms. Deborah Wylie
Master Planning Director
p 310-459-8322
e deborah.wylie@build-laccd.org



Santa Barbara City College

AFFORDABLE HOUSING MARKET ANALYSIS

SANTA BARBARA, CA

CLIENT OPPORTUNITIES

- › Address affordability and availability challenges in the Santa Barbara housing market by exploring college-affiliated housing
- › Evaluate the feasibility of developing student housing consistent with California's SB 169 Higher Education Student Housing Grant Program
- › Understand the housing needs and preferences of a diverse student body, including those lacking permanent housing
- › Assess financial strategies, funding sources, and risk tolerance for a potential affordable housing project

B&D APPROACH

- › Conducted a bilingual survey of 700+ students to evaluate housing conditions, costs, satisfaction, and demand
- › Analyzed off-campus rental markets and student-focused properties to assess affordability, availability, and competition
- › Applied B&D's proprietary demand model to estimate unmet demand of 1,482 beds and test program concepts
- › Developed and evaluated four housing scenarios, including financial feasibility, capital fundraising needs, and potential funding sources

PROJECT OUTCOMES

- › SBCC gained a clear **understanding of local housing market conditions**, student housing **demand**, and the **impact of affordability** on enrollment and academic success
- › Identified development **concepts tailored to SBCC's needs**, including high-density, cost-effective designs that balance affordability with program requirements
- › Established the **financial framework to pursue future housing development**, including an understanding of required subsidies, capital fundraising targets, and potential funding partnerships



Sacramento State University

STUDENT + EMPLOYEE HOUSING AND P3 DEVELOPMENT ADVISORY SERVICES

SACRAMENTO, CA

CLIENT OPPORTUNITIES

- › Create an opportunity to develop a new campus gateway, retail, and food service options to an underserved area of campus, as well as on-campus apartment style living for upper-division students
- › Advance its mission to support academic success, graduation initiative, and bring upper-division students closer to academic resources on campus
- › Provide new housing for faculty and staff as they transition to living in the Sacramento area, supporting employee recruitment and retention efforts
- › Maintain campus land for future master plan initiatives while adding 15 acres to campus

B&D APPROACH

- › Conducted a strategic visioning session to ensure an efficient planning process and align stakeholder-targeted aspirations
- › Defined the detailed parameters of the proposed project, analyzing programmatic, locational, capital, and operating components
- › Performed community and campus market analyses, concept development, and programming requirements
- › Created financial analyses, financing structure evaluations, and implementation strategies
- › Led the selection process for development partner that aligned with campus mission, goals, and project objectives
- › Advised the university through pre-development negotiations with P3 partners and the city

PROJECT OUTCOMES

- › **Hornet Commons opened Fall 2021 as the first P3 development at Sacramento State—** \$164M project housing 1,100 students in apartments including a small retail operation
- › A second P3 student housing project, **Hornet Place, is currently in development** adding an additional 350 beds for students in apartments and is scheduled to open for Fall 2027
- › **Nine-Ten Place opened Fall 2024 providing 30 units of employee housing** for Sacramento State—funded through revenue bonds, the \$19M project provides a unique living opportunity within walking distance of campus
- › Guided **policy and residential life planning** for future housing developments

CLIENT REFERENCE

Mr. John Melikian
Executive Director,
University Enterprises, Inc.
p 916-278-7001
e john.melikian@csus.edu



County of Santa Barbara

AFFORDABLE WORKFORCE HOUSING P3 DEVELOPMENT OPPORTUNITY

SANTA BARBARA, CA

CLIENT OPPORTUNITIES

- › Expand affordable housing options to secure a range of income levels
- › Leverage as many as 30 County owned assets to address the critical need for more affordable housing
- › Promote long term community benefit and create a replicable model for future County partnerships

B&D APPROACH

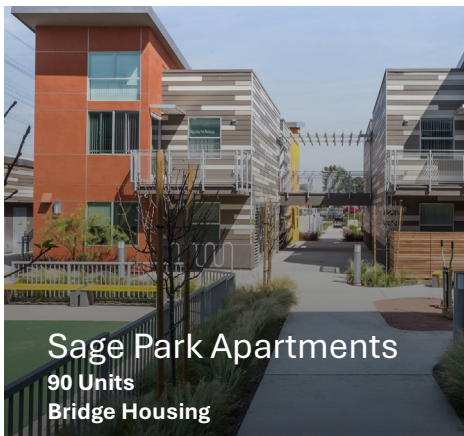
- › Evaluated several options for the development of the site and prepared financial proformas to determine if development of the site would be viable, taking into account factors such as height, setbacks, parking and current financing options
- › Conducted extensive outreach to development community, local architects, contractors and lenders to both confirm its financial and feasibility assumptions used in its evaluation of the site as well as build awareness and interest in the future P3 RFP
- › Recommended a multi-step solicitation process which began with a Request for Qualifications (RFQ), then interviews to create a short list and then the issuance of an RFP for a P3 partner

PROJECT OUTCOMES

- › Determined need for approximately **90 units with incomes ranging up to 120%** of Area Median Income (AMI)
- › Received **15 responses from highly qualified development teams** to December 2025 RFQ
- › Selected **five firms from interviews in January 2026 to receive the RFP**, with responses due in March 2026
- › The Board of Supervisors **authorized staff to proceed with negotiations** with the recommended developer at the May Board meeting
- › Currently **considering other potential sites for future development** upon successful selection of a P3 partner and negotiated ground lease

CLIENT REFERENCE

Mr. Joseph Dzvonik
Assistant Director, Housing
and Community Development
Division
[p 805-568-5623](tel:805-568-5623)
[e jdzvonik@countyofsb.org](mailto:jdzvonik@countyofsb.org)



Los Angeles Unified School District

AFFORDABLE WORKFORCE HOUSING P3 DEVELOPMENTS

LOS ANGELES, CA

The following projects represent work performed by Al Grazioli prior to joining B&D.

SAGE PARK APARTMENTS

- › 90 Affordable one-, two-and three-bedroom apartments located on a 3.5-acre site adjacent to Gardena High School in Los Angeles, which include a fitness room, community room, laundry facilities, a community garden, and landscaped courtyards
- › Rents are affordable for families earning 30% - 60% of Area Median Income
- › **P3 Partner:** Bridge Housing

SELMA COMMUNITY HOUSING

- › 66 Affordable one-, two-and three-bedroom apartments located on a 4.76-acre site adjacent to Selma Elementary School in Los Angeles, which include an after-school program room, computer lab, landscaped courtyard with tot lot, resident center, and rooftop terrace
- › Rents are affordable for families earning 30% - 60% of Area Median Income
- › **P3 Partner:** Abode Communities

NORWOOD LEARNING VILLAGE

- › 29 Affordable one-, two-and three-bedroom apartments located on a 4.77-acre site adjacent to Norwood Elementary School in Los Angeles, which include a community room equipped with a full kitchen, fitness center, library, and entertainment room
- › Rents are affordable for families earning 30% - 60% of Area Median Income
- › **P3 Partner:** Thomas Safran & Associates



Lompoc USD Housing Assessment

Lompoc Unified School District initiated a workforce housing assessment to address growing housing challenges affecting district employees and staff retention. The effort required careful evaluation of potential sites, development partnerships, and long-term feasibility while maintaining flexibility as planning continued.

RRM partnered with Space Valley Housing Partners, the Housing Authority of the County of Santa Barbara, and Abbott Reed to support the District's exploration of workforce housing opportunities. Following a competitive RFP process, our team was selected to advance negotiations for a potential housing development at the Jupiter Avenue site. The process included site analysis, planning coordination, and early feasibility considerations to help inform future decision-making.

The result is a proactive framework that positions the District to explore attainable housing solutions for employees while supporting long-term educational and community stability in Lompoc.

RRM Design Group

Client

Russ Levanway
Executive Vice President
REACH
russ@reachcentralcoast.org
(877) 829-5500

Location

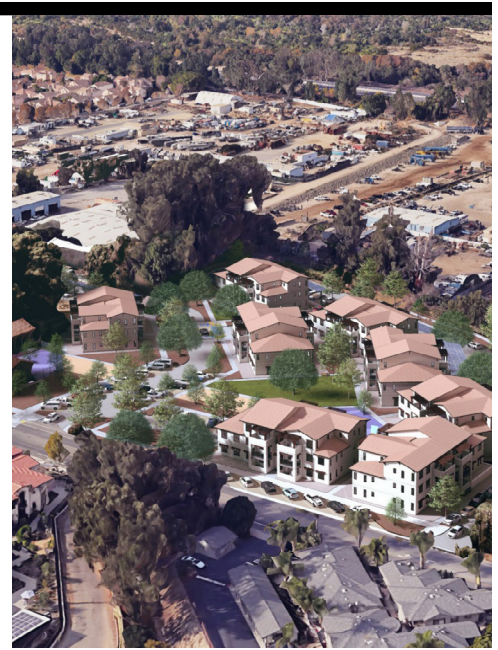
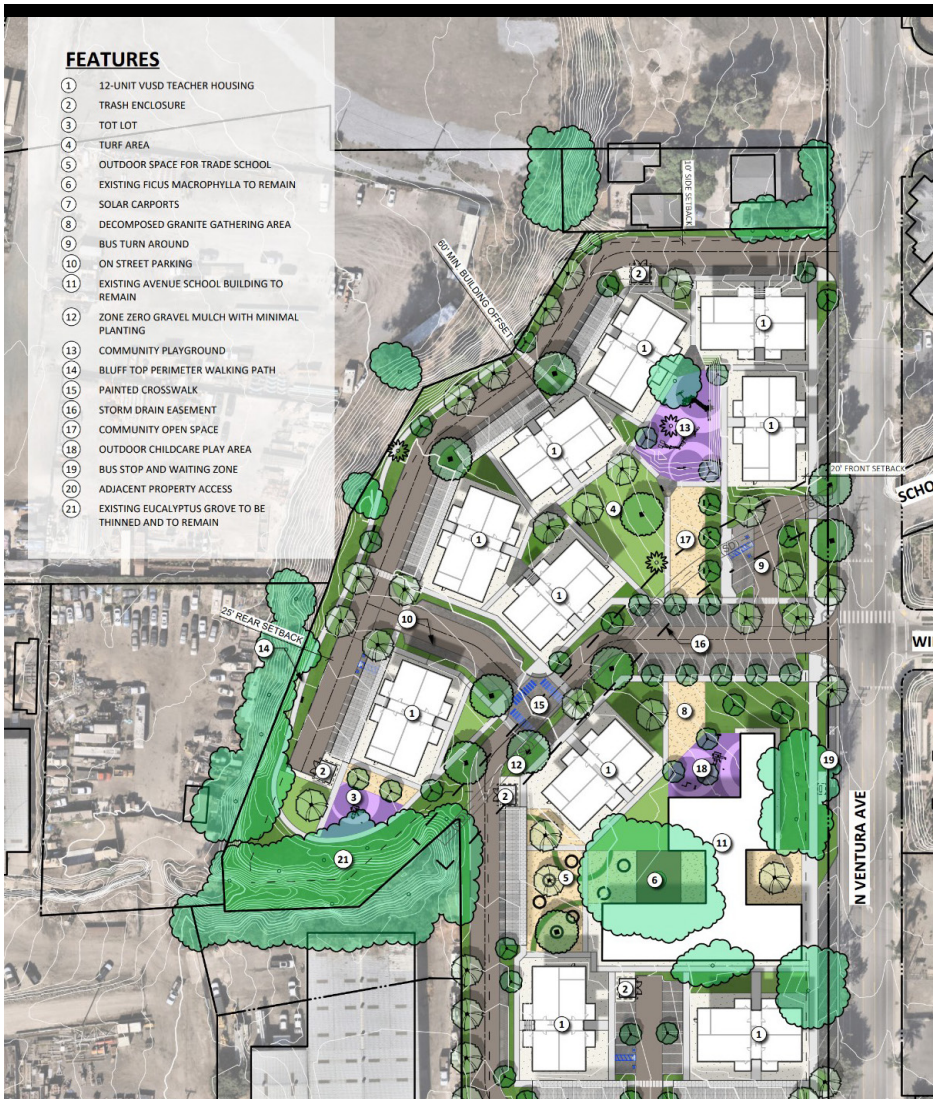
Lompoc, CA

The RRM Teams Involved

- Planning
- Architecture
- Civil Engineering

Project Timeline

2024- Present



Ventura USD Workforce Housing

Ventura Unified School District identified the former Avenue School site as an opportunity to expand affordable and workforce housing options for educators and local families. The challenge was to evaluate how the site could accommodate meaningful residential density while responding to wildfire constraints, existing easements, and preservation of significant landscape features.

RRM provided a yield study to help assess the redevelopment potential of the surplus school property. The conceptual program envisioned 120 affordable apartment homes across multiple small-scale residential buildings, with a mix of one-, two-, and three-bedroom units prioritized for VUSD employees and other local workforce households. The planning approach carefully worked around site constraints, preserved mature trees, and incorporated wildfire-resistant design and accessible community-oriented spaces.

The result was a thoughtful planning framework that supports long-term housing stability for educators and families while advancing the District's broader goals for community investment and neighborhood-sensitive development.



Client

Housing Authority of the City of San Buenaventura

Location

Ventura, CA

The RRM Teams Involved

- Architecture

Project Size

120 residential units

Project Timeline

2025 - Present



LEED Gold Certified
- US Green Building Council (USGBC)



Crestview Terrace Affordable & Market Rate Community in Arrowhead Grove

A transformational affordable + market-rate development

Crestview Terrace in Arrowhead Grove is a transformational master-planned community located in the heart of San Bernardino. This 38-acre site consists of more than 400 beautifully designed apartment homes for individuals, families and seniors. The neighborhood is conveniently located near affordable child care, quality schools, higher education, shopping, healthcare facilities, City and County Government offices and agencies, and is less than a mile from San Bernardino's new sbX transit line. Outdoor classrooms, community gardens, edible landscaping, inspirational art and musical expression blur the boundaries between home and school, indoors and outdoors, nature and technology, young and old.

RRM Design Group

Client

National Community Renaissance of California (National CORE)

Location

San Bernardino, CA

The RRM Teams Involved

- Architecture
- Landscape Architecture
- Structural Engineering

Project Size

- 184 total units
- 38 acres

Project Timeline

2019- Present

D

TECHNICAL APPROACH AND METHODOLOGY

- ☑ 6 pages maximum.
- ☑ Detailed approach to each phase of the scope of services.
- ☑ Methodology for successfully achieving project entitlements.
- ☑ Strategy for maintaining school operations during the development process.
- ☑ Timeline for completion of each project phase.

The RFP requests the consultant to provide comprehensive development feasibility analysis and development services including work broken out in four phases or tasks. Although our proposal reflects all the work described in Tasks 1 – 4, our approach described below will realign the scope of work into phases we believe will provide optimal outcomes for the District and represent the appropriate timing of the scope of the work in relation to the schedule.

Approach

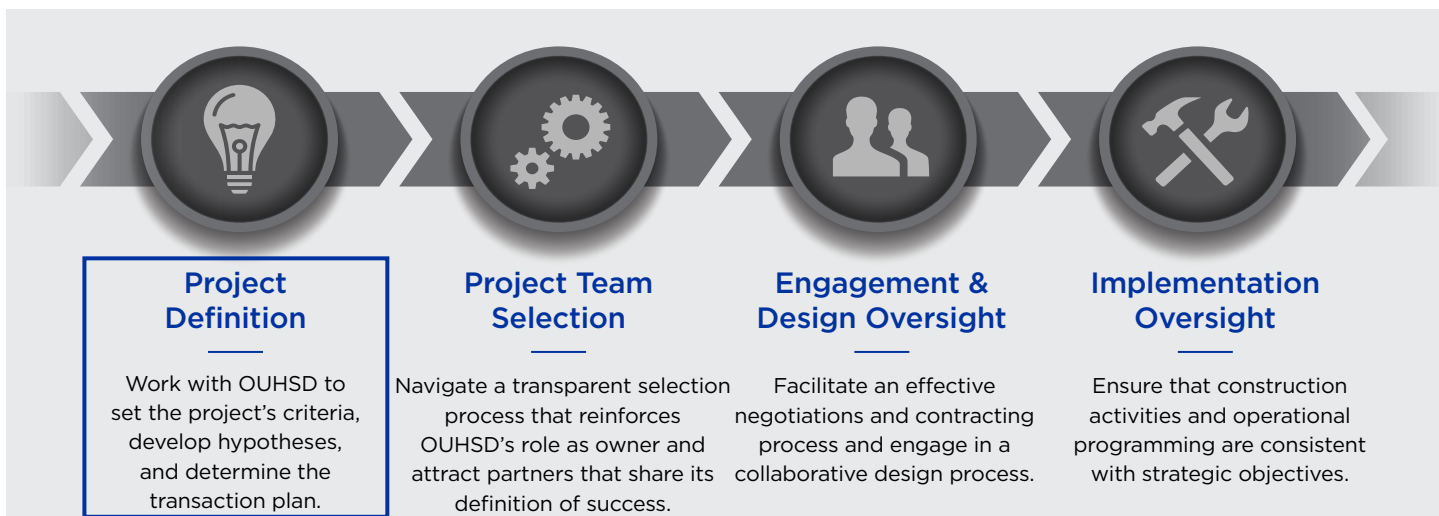
The following represents an informed, experienced, and data driven approach B&D has successfully used with similar educational institutions throughout the country to initiate and implement an affordable housing program for its employees and families. Of course, upon being selected, we would tailor this approach to OUHSD's specific needs, goals, and mission.

The work plan that follows has been structured to guide OUHSD through a clear step-by-step process for evaluating its goals, developing a vision, evaluating the needs of its employees, and a thorough evaluation of the potential for the two sites under consideration to support workforce housing. When combined with an informed financial modeling, market sounding and outreach to the development and investment community, B&D will deliver, not simply a report, but a truly implementable set of recommendations and a plan that will allow the District to achieve its goals.

B&D's approach goes beyond technical feasibility. We help clients clarify the “why” behind a project establishing the key criteria, priorities, and measures of success that will guide a decision. By anchoring the feasibility study in OUHSD's mission, housing objectives, community priorities, and any unique opportunities or challenges presented, will ensure that our recommendations are not only practical and data driven but also aligned with the outcomes that matter most.

This is what B&D calls **Phase 1: Project Definition**, shown below within our four-phase development advisory process, which lays the groundwork for confident decision-making and a strong path forward.

The scope of work activities listed below often overlap in duration and within the program's overall schedule, particularly efforts associated with feasibility analysis, planning, and communications and community engagement.



Document and Data Request, Program Development, and Planning

Gathering information, doing due diligence and developing a plan.

And initial step in our process will be to review requested documents and data, understand strategic drivers, establish project, committees, and timelines, meet with District administrators, and prepare materials for approval, possibly by a facility subcommittee established by the board. This can also include working with the Board to develop additional resolutions and directives, confirming the commitment to workforce housing.

Strategic Visioning Session

Establishes the strategic decision-making criteria that will inform and guide, subsequent planning and implementation of activities.

It is critical that the decision-making criteria are established by key District stakeholders very early in the process. This visioning session will establish how to align OUHSD's culture, mission, priorities, financial constraints and vision with plans for identifying affordable housing options for teachers, staff, and families. By placing institutional mission at the forefront of any decision, B&D offers a process that will create a plan that enhances the employee community experience while advancing the District's broader strategic plan.

Communications and Community Engagement Plan

Community engagement and a well-defined communications strategy is key.

At B&D, we recognize that clear communication and authentic engagement are essential to the success of every project. Our Communications and Public Engagement (CPE) team specializes in translating complex processes into accessible, meaningful experiences for stakeholders—from District and community leaders to constituents and facility users.

What sets us apart is our ability to integrate seamlessly with your team, providing both advisory support and hands-on execution. Utilizing OUHSD's current communications and outreach strategies and in-depth stakeholder analyses, B&D will develop a communications matrix that includes both internal and external stakeholder groups, modes and frequency of communication, and tools/supports needed to ensure an equitable process. We understand that interaction with OUHSD staff, families, and the community will be successful with a solid understanding of stakeholder groups and the best ways to communicate with them. The communications strategy consists of the following steps:



B&D will work with OUHSD staff to develop and identify components of the messaging including, but not limited to, a proper name, logo, graphic assets, and dedicated website or landing page where stakeholders can stay aware of the purpose of the plan, its progress, and exactly how they will be informed and engaged throughout the process.

It will be important to ensure that all existing communication tools are aligned with OUHSD's style guidelines, (i.e., surveys, collateral materials, plans, reports, website/ landing page, etc.). We will also work with OUHSD to develop a brand positioning plan. This step would include the development of program purpose, key talking points, and campaign materials tailored to various stakeholder groups.

Meetings and Communications

Fostering a culture of communication and consensus-building is critical to the success of any future housing plans. As the District's advisor, B&D will carefully manage the decision-making process as the planning effort proceeds. B&D will participate in a series of regularly scheduled project, stakeholder, and community meetings. Over the duration of the 5 month schedule, we have assumed two Board meetings, two community meetings, two meetings with an Executive Committee of OUHSD leadership and meetings with the Working Group a minimum of every other week and more likely weekly.

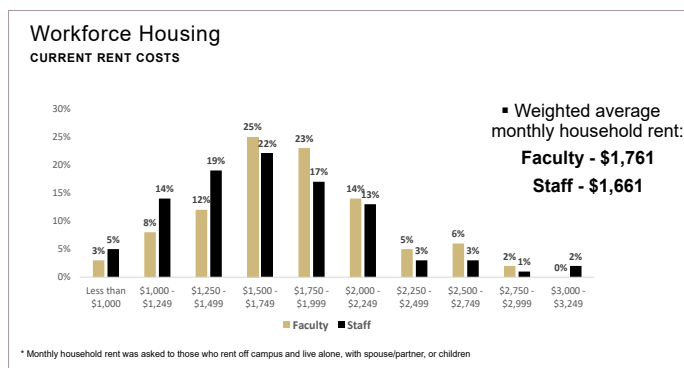
Identifying Affordable Housing Needs

Understand the employee housing needs, their current living situations, an evaluation of the market and affordability gaps and determine the demand for affordable housing by market / demographic segment.

EMPLOYEE RESEARCH AND ANALYSIS

Although the District previously conducted an employee survey, it is critical that we understand the current interests, needs, and housing configurations the current and future employees will require in order for the workforce housing program to be successful. Therefore, B&D will conduct a detailed demographic and employment trends analysis to define and size the primary target market for affordable housing. Data on employees provided by OUHSD will be analyzed by looking at a range of factors including address, working location, age, tenure with the District, marital and dependent status, and other demographic factors to establish profiles of employees and potential target markets.

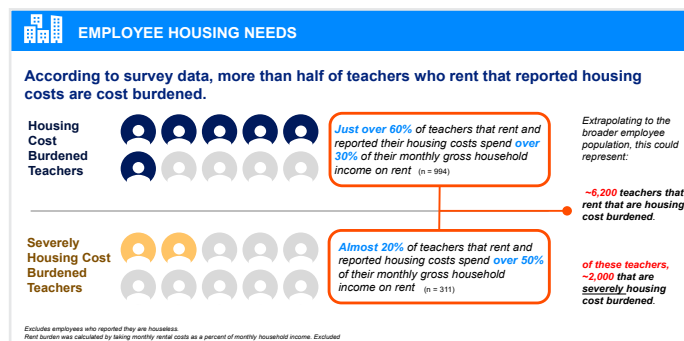
We will also conduct stakeholder interviews with a range of OUHSD staff to understand hiring challenges, recruitment efforts, retention efforts, staffing projections, retirement trends, etc. This research would also include focus groups with various groups of employees to qualitatively gather data and information related to housing situations.



ONLINE EMPLOYEE SURVEY

The affordable housing plan must be designed with your employees in mind. As such, B&D will work in conjunction with project stakeholders on a web-based survey to be distributed to all OUHSD employees.

The survey will assess current living situations, income levels, housing preferences, locational desires, and other attributes that B&D has incorporated in understanding employee housing needs. There are additional factors documented by the survey including dependents (either children or elder family members) which will be important to understand when looking at housing options and unit types.



The survey information will also be used as the basis for demand projections utilizing B&D's proprietary demand-based programming (DBP) model, which is a predictive platform that outlines the ideal program mix based on OUHSD's own unique employee preferences. The DBP phase of the analysis will determine demand preferences by classification and unit type in a statistically valid way.

Site Analysis, Feasibility Planning, and Concept Development

Find and evaluate potential site solutions for the development of affordable housing and provide OUHSD with potential paths forward to evaluate in the future.

B&D and RRM will leverage extensive experience in the planning and design of multifamily affordable and workforce housing communities to evaluate the development potential of the District's sites. Our objective will be to identify realistic, achievable housing opportunities that align with the District's goals while responding to the unique characteristics of each site.

The process will begin with a comprehensive evaluation of the regulatory, physical, and community context of the properties. An initial site visit involving the B&D team, RRM principals, and OUHSD representatives will provide an opportunity to observe the sites firsthand and gain a deeper understanding of their relationship between the two parcels, surrounding neighborhoods, access patterns, and other contextual factors that may influence future development.

B&D and RRM will review all available due diligence materials provided by the District, including surveys, maps, title information, land use history, utility and infrastructure data, environmental documentation, and any relevant planning studies. We will also work closely with District representatives to understand their programmatic objectives, priorities, and long-term vision for employee housing. Based on this analysis, the team will evaluate applicable planning, zoning, and development regulations and prepare a graphic opportunities and constraints analysis identifying key factors that may affect the development potential of each site.

RRM will then prepare preliminary feasibility and yield studies illustrating a range of development scenarios and housing strategies. These studies will include conceptual site plans, estimated unit yields, parking concepts, and three-dimensional massing models that can be viewed from multiple perspectives. Alternative concepts will explore varying site layouts, development intensities, building configurations, unit mixes, and open space strategies. The objective will be to test and compare multiple approaches to identify the solutions that best balance housing production, livability, financial feasibility, neighborhood compatibility, and District objectives. During this phase, RRM will work collaboratively with the B&D team and OUHSD representatives to evaluate, refine, and prioritize the development alternatives. This iterative process will deliver the best outcome of the feasibility effort.

Throughout this process, B&D will continue to evaluate the requirements associated with CEQA and how recent legislation, such as AB2295 could be used to support and possibly enhance the overall program development timeline. We will also determine how the SOAR initiative may impact the development and recommend strategies to address its potential impact on the project.

Following completion of the employee housing needs assessment, RRM will finalize programming and development of the alternatives tailored to the identified housing demand. To help communicate the potential character and vision of the proposed communities, RRM will prepare rendered three-dimensional illustrations depicting the scale, appearance, and architectural qualities of the development scenarios. These visualizations will provide stakeholders with a clear understanding of how future housing could be integrated into the surrounding environment. Upon completion of the evaluation process, RRM will prepare presentation-quality graphics, diagrams, and supporting materials suitable for School Board meetings, stakeholder outreach, and public engagement efforts, helping the District effectively communicate both the opportunities and benefits associated with future employee housing development.

Development Strategy and Financial Analysis

PHASING STRATEGY

There will be several options for development using all or portions of the high school site and the adjacent agricultural area. The use of any or all the areas under consideration for development must be carefully and thoughtfully considered and a well-developed phasing plan will be required. Within the options under consideration, B&D and RRM will further study the advantages of phasing the development in a way that mitigates any impacts on the school facilities and operations and considers the requirements and timing for processing development plans in the local area. If the athletic field and walking track are needed in the overall development of the site for construction staging, housing development or access, that will require the relocation of the field and track to the agricultural area in a first phase. The potential impact of the SOAR initiative must be carefully considered in terms of phasing options as well.

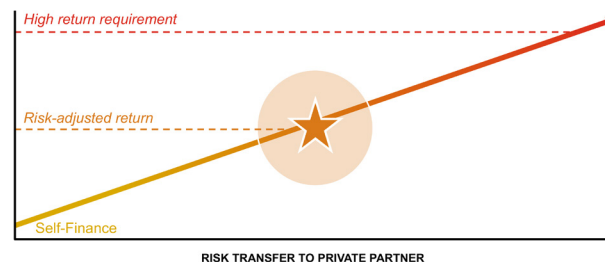
MARKET SOUNDING, DEVELOPER OUTREACH, AND INDUSTRY FORUM

B&D will conduct market sounding, outreach and/or industry forums with local and regional contractors, developers, and financing entities to test the housing options, development, and pro forma scenarios being considered and to further refine the assumptions in the financial models. This will also serve to build awareness and anticipation with potential future development partners.

FINANCIAL FEASIBILITY, PROJECT DELIVERY STRUCTURE, AND RISK ASSESSMENT

We will develop a dynamic, interactive financial pro forma model designed specifically for this project, giving the District a powerful decision-making tool rather than a static spreadsheet. The model will integrate all major cost and revenue components—such as development scale, construction phasing, and operating approach—while allowing us to instantly test “what if scenarios. By working through the model together in a series of collaborative sessions, we can quickly validate assumptions, stress-test financial performance under different market conditions, and ensure the analysis remains aligned with OUHSD’s strategic goals.

In addition to testing the base feasibility of the project, our modeling process will allow the District to compare multiple delivery strategies side-by-side. Whether the District develops and operates the project itself, engages in a ground lease with a private partner, or pursues a full P3 approach, we can quantify the tradeoffs in terms of risk, control, and financial return. This clarity helps decision-makers move forward with confidence, knowing which option works best financially and how it aligns with long-term community objectives.



Strategic Recommendations and Implementation Planning

At this stage, we will deliver a set of recommendations presented in a clear, actionable path forward grounded in data, financial analysis, and the District’s own priorities. It is a strategic roadmap that positions OUHSD leadership to make confident, well-supported decisions about the potential use of one or both District properties for workforce housing. We will distill our findings into a compelling narrative that can be presented directly to the Board, aligning the project’s purpose, financial realities, and community impact into one cohesive story. Whether the analysis points to moving forward with a project or determining that the site is better suited for another use, the Board will have the clarity and confidence needed to act decisively. We will also provide initial high-level considerations related to delivery methods and transaction types to determine if there are significant hurdles in the development of the property.

Schedule

A typical project schedule for a housing advisory initiative beginning with project initiation through securing a development partner and executing a development agreement, could range from 6 – 12 months (or more) depending on a variety of factors—sites under consideration, the timing and frequency of Board meetings, timeliness of decision making, whether sites need to go through a 7-11 process or declared surplus, amount of public engagement, availability of associated stakeholders (i.e., unions, governmental agencies, etc.), the number of employees to be surveyed, potential deal structures to be considered (ground lease, sale, exchange, master leasing), and the duration of the RFQ/RFP process to select a partner can all impact the schedule.

We have assumed an approximately 5-month schedule (below) based on contract execution July 1, 2026. This will provide OUHSD leadership with strategic recommendations and a data driven, financially viable plan by the Fall 2026 holidays. As such, OUHSD will be ready to move into what B&D refers to as Phase II: Project Team Selection, which could involve an RFQ/RFP process to identify a developer, in January 2027. We have assumed two Board presentations, two community meetings, two meetings with an Executive Committee, and biweekly meetings with the District's working group. **Note:** Much of the market analysis, site evaluation, and planning work will take place early over the summer, when faculty and staff are on break. We will conduct the employee survey in September after classes resume.

KEY: W = Bi-weekly working group meeting; E = Executive Committee meeting; B = Board meeting; C = Community meeting

PROPOSED SCHEDULE (2026)	July			August		September	October				November	
	W	W	W	W	W	W, E, C, B, W	W	C	W	E	W	B
Project Alignment and Strategic Planning												
<i>Doc and Data Request</i>												
<i>Site Visit</i>												
<i>SAV - District Goals</i>												
<i>Community Engagement Strategy</i>												
<i>Employee Needs Assessment / Market Analysis</i>												
<i>Employee Survey</i>												
Site Feasibility and Due Diligence												
<i>Site Analysis and Infrastructure Assessment</i>												
<i>Zoning and General Plan Designations</i>												
<i>Planning & Entitlement Process</i>												
<i>CEQA Requirement Analysis</i>												
<i>Regulatory Framework Analysis</i>												
<i>Evaluate Using Various Forms of Legislation</i>												
Development Strategy and Financial Analysis												
<i>Conceptual Design</i>												
<i>Phasing Strategy</i>												
<i>Budget Development and Cost Estimating</i>												
<i>Market Sounding and Outreach</i>												
<i>Operating Pro Forma & Debt Service Capacity</i>												
<i>Funding Approaches & Affordability</i>												
<i>Funding Strategy Development</i>												
<i>Risk Assessment, Challenges & Mitigation Measures</i>												
Strategic Recommendations and Implementation												
<i>Optimal Development Strategy</i>												

E

FEE PROPOSAL

- ☑ 2 pages maximum.
- ☑ Fee schedule (on a “not to exceed” basis) with hourly rates by individual and position.
- ☑ Fees for Project Consultants.
- ☑ Itemized total project cost estimate (matching Attachment 1).
- ☑ Allowance for reimbursable expenses.
- ☑ Payment schedule aligned with deliverable completion.

Introduction to Fees

Brailsford & Dunlavey strives to align our fees with the value we create. We believe OUHSD should feel confident that it has received exceptional value, while B&D is equipped with the resources necessary to deliver our best work efficiently. Our fees are grounded in a clear and fair rationale.

When proposing a fixed fee, we:

1. Estimate the effort required, based on team member hours, the scope's complexity, and timeline constraints; and
2. Assess the degree of uncertainty around key assumptions or external factors beyond our control.

We believe the District and Board of Education will be well positioned to review the strategic recommendations, and implementation plan for the next phase of the initiative and development of the site within 5 months. We believe the scope is sufficiently defined to propose a fixed fee of \$163,000. We propose the fee be paid in equal monthly installments of \$32,600 over the 5-month period. Multiple tasks and phases of the work are happening concurrently, but the associated chart (at right) provides a general allocation of the fee to the phases of the work effort.

The total fixed fee is a combination of the B&D fee of \$125,000 and the RRM fee of \$38,000.

We recommend a reimbursable expense budget not to exceed \$3,500, for costs such as printing, meeting materials, travel, and shipping, to be billed at cost with no additional markup. Our goal is to ensure transparency, predictability, and high-value, decision-ready advisory support throughout the engagement.

Scope of Work	Fee
Project Alignment and Strategic Planning	
Project Kickoff, Doc & Data Request, Site Visit	\$5,000
District Goals, Priorities, Fiscal Constraints, SAV	\$10,000
Employee Needs Assessment, Research & Market Analysis	\$10,000
Stakeholder Engagement	\$5,000
Employee Survey & Documentation	\$10,000
Communications Strategy and Plan	\$15,000
Site Feasibility and Due Diligence	
Site and Infrastructure Assessment	\$8,000
Regulatory, Zoning & General Plan Analysis	\$10,000
Planning and Entitlement Process, Regulatory Framework	\$7,500
CEQA Requirements & Evaluation Using Recent Legislation	\$7,500
Development Strategy and Financial Analysis	
Concept Design, Refinement, and Phasing Strategy	\$29,000
RRM Renderings (3) of Housing Options	\$5,000
Budget Development and Cost Estimating	\$7,500
Market Sounding and Outreach	\$6,000
Financial Feasibility, Pro Forma, and Risk Assessment	\$10,000
Funding Strategy Development	\$7,500
Strategic Recommendations and Implementation	
Optimal Development Strategy & Implementation Plan	\$10,000
TOTAL FIXED FEE	\$163,000

All or a good portion of our fees incurred by the District associated with the Workforce Housing effort are often recoverable from the deposit or option payments provided by the developer. In addition, the California School Board Association (CSBA) has recently developed a revolving loan fund for districts to use for due diligence efforts associated with workforce housing on district land. The maximum loan amount is \$150,000. B&D would be happy to work with the District to provide support in the research of, and application for, these funds from CSBA to support your workforce housing initiative.

The District has indicated that the contract for advisory services will be for a term of one year. The one-year term is acceptable to B&D. Given that B&D proposes to complete the scope of work within 5 months, B&D will be happy to continue its role as OUHSD's trusted advisor for months 6-12 and beyond on an hourly basis in accordance with the rate schedules below. Alternatively, the District and B&D can work together to develop an additional scope of services for which B&D would be glad to provide a fixed fee.

B&D Hourly Billing Rates

Title	Rate
Project Assistant	\$165
Coordinator	\$210
Project Analyst	\$275
Senior Analyst/Assistant PM	\$290
Associate/Project Manager	\$335
Senior Associate/Senior PM	\$380
Director/Regional Vice President	\$445
Executive Director/Vice President	\$505
Senior Vice President	\$580
Executive Vice President	\$620
President	\$685

Note: B&D's hourly rates are subject to annual escalation in keeping with normal business practice.



EXHIBIT A-1 SCHEDULE 1

Bill Rate Ranges

Subject to change effective March 1st each year

ARCHITECTURE

Designer I - Arch	\$ 86 - \$ 117
Designer II - Arch	\$ 93 - \$ 137
Designer III - Arch	\$ 111 - \$ 176
Job Captain	\$ 111 - \$ 176
Architect	\$ 117 - \$ 179
Project Designer	\$ 130 - \$ 203
Project Manager - Arch	\$ 138 - \$ 218
Project Architect	\$ 130 - \$ 203
Quality Control Manager	\$ 155 - \$ 263
Senior Designer	\$ 158 - \$ 256
Senior Architect	\$ 162 - \$ 270
Senior Project Manager	\$ 171 - \$ 277
Associate Manager	\$ 168 - \$ 259
Design Director	\$ 183 - \$ 308
Manager of Architecture	\$ 189 - \$ 308
Director of Architecture	\$ 201 - \$ 330
Intern Architecture	\$ 60 - \$ 91
Principal	\$ 225 - \$ 382
Managing Principal	\$ 249 - \$ 445

ENGINEERING

CIVIL ENGINEERING

Construction Inspector	\$ 107 - \$ 201
Designer I - Civil	\$ 75 - \$ 119
Designer II - Civil	\$ 92 - \$ 144
Associate Engineer	\$ 141 - \$ 200
Senior Associate Engineer	\$ 156 - \$ 254
Engineer I - Civil	\$ 110 - \$ 158
Engineer II - Civil	\$ 123 - \$ 177
Engineer III - Civil	\$ 136 - \$ 195
Project Engineer - Civil	\$ 153 - \$ 224
Senior Project Engineer - Civil	\$ 174 - \$ 276
Project Manager - Civil	\$ 188 - \$ 291
Manager of Engineering Services - Civil	\$ 209 - \$ 332
Intern, Civil Engineering	\$ 60 - \$ 91
Principal	\$ 225 - \$ 382
Managing Principal	\$ 249 - \$ 445

STRUCTURAL ENGINEERING

Production Drafter I	\$ 75 - \$ 126
Production Drafter II	\$ 92 - \$ 147
Production Drafter III	\$ 109 - \$ 158
Senior Drafter	\$ 128 - \$ 208
Engineer I - Structural	\$ 105 - \$ 154
Engineer II - Structural	\$ 123 - \$ 192
Project Engineer - Structural	\$ 147 - \$ 216
Senior Project Engineer - Structural	\$ 164 - \$ 269
Project Manager - Structural	\$ 175 - \$ 277
Manager of Engineering Services - Structural	\$ 199 - \$ 318
Intern, Structural Engineering	\$ 60 - \$ 91
Principal	\$ 225 - \$ 382
Managing Principal	\$ 249 - \$ 445

SURVEYING

Survey Technician I	\$ 82 - \$ 125
Survey Technician II	\$ 95 - \$ 144
Survey Technician III	\$ 110 - \$ 170
Party Chief	\$ 120 - \$ 177
Senior Party Chief	\$ 142 - \$ 228
Assistant Land Surveyor	\$ 126 - \$ 184
Land Surveyor	\$ 144 - \$ 214
Senior Land Surveyor	\$ 171 - \$ 254
Supervisor of Surveying	\$ 180 - \$ 261
Manager of Surveying	\$ 189 - \$ 291

INTERIOR DESIGN

Designer I - Int	\$ 84 - \$ 115
Designer II - Int	\$ 90 - \$ 137
Associate Interior Designer	\$ 97 - \$ 144
Interior Designer	\$ 108 - \$ 172
Project Interior Designer	\$ 128 - \$ 194
Senior Interior Designer	\$ 143 - \$ 242

LANDSCAPE ARCHITECTURE

Assistant Designer	\$ 87 - \$ 123
Associate Designer	\$ 96 - \$ 140
Designer - Land	\$ 108 - \$ 187
Landscape Architect	\$ 111 - \$ 179
Senior Landscape Architect	\$ 135 - \$ 219
Principal Landscape Architect	\$ 159 - \$ 257
Design Director of Landscape Architecture	\$ 162 - \$ 259
Manager of Landscape Architecture	\$ 168 - \$ 263
Intern Landscape Architecture	\$ 60 - \$ 91
Principal	\$ 225 - \$ 382
Managing Principal	\$ 249 - \$ 445

PLANNING

Assistant Planner	\$ 99 - \$ 142
Associate Planner	\$ 117 - \$ 187
Urban Designer	\$ 117 - \$ 187
Senior Planner	\$ 149 - \$ 228
Senior Urban Designer	\$ 149 - \$ 228
Supervisor of Planning & Urban Design	\$ 161 - \$ 244
Principal Planner	\$ 182 - \$ 277
Manager of Planning & Urban Design	\$ 195 - \$ 291
Principal Park Planner	\$ 182 - \$ 277
Principal	\$ 225 - \$ 382
Managing Principal	\$ 249 - \$ 445

CORPORATE SERVICES

Administrative Assistant	\$ 69 - \$ 108
Administrative Coordinator	\$ 83 - \$ 144
Office Manager	\$ 119 - \$ 179
CEO	\$ 311 - \$ 556
File Clerk/Administrative Support	\$ 62 - \$ 90
Marketing Assistant (Intern)	\$ 60 - \$ 95
Marketing Coordinator	\$ 77 - \$ 130
Marketing Manager	\$ 141 - \$ 263
Marketing Specialist	\$ 104 - \$ 172
Office Coordinator	\$ 83 - \$ 144
Business Development & Pursuits Supervisor	\$ 126 - \$ 215
Receptionist	\$ 62 - \$ 94
Senior Marketing Specialist	\$ 119 - \$ 208

SURVEYING (Crew Rates)

REGULAR	
One Person w/ GPS or Robotic Workstation	\$ 185
Two Person Crew	\$ 250
Three Person Crew	\$ 330
PREVAILING WAGE	
One Person w/ GPS or Robotic Workstation	\$ 285
Two person Crew Prevailing Wage	\$ 350
Three person Crew Prevailing Wage	\$ 450

F

INSURANCE, LEGAL, AND PROFESSIONAL STANDING

- ☒ 2 pages maximum.
- ☒ Acknowledgement to provide the required insurance.
- ☒ Detailed disclosure of any litigation, arbitration, or disciplinary actions involving the proposer or key personnel within the past seven (7) years (If no such actions exist, provide an explicit statement to that effect).

Insurance

Our standard Certificate of Insurance is included on the following page and will be updated to reflect the District upon award.

Litigation, Arbitration, or Disciplinary Actions

There are no actions of litigation, arbitration, or discipline that pertain to B&D nor the key personnel.





CERTIFICATE OF LIABILITY INSURANCE

6/20/2026

DATE (MM/DD/YYYY)

1/28/2026

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 have ADDITIONAL INSURED provisions or 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 Lockton Companies, LLC DBA Lockton Insurance Brokers, LLC in CA CA license #0F15767 2100 Ross Ave., Ste. 1400 Dallas TX 75201 (214) 720-5563 TXClientSrvUT@lockton.com		CONTACT NAME: PHONE (A/C, No, Ext): FAX (A/C, No): E-MAIL ADDRESS:	
INSURED 1557253 Brailsford & Dunlavey, Inc. 1220 19th Street, Suite 400 Washington DC 20036		INSURER(S) AFFORDING COVERAGE INSURER A: RLI Insurance Company INSURER B: Lexington Insurance Company INSURER C: Beazley Excess and Surplus Insurance, Inc. INSURER D: Underwriters at Lloyds of London INSURER E: National Union Fire Ins Co Pitts. PA INSURER F:	
		NAIC # 13056 19437 17520 10736 19445	

COVERAGES

CERTIFICATE NUMBER: 22949866

REVISION NUMBER: XXXXXXXX

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	☒ COMMERCIAL GENERAL LIABILITY ☐ CLAIMS-MADE ☒ OCCUR GEN'L AGGREGATE LIMIT APPLIES PER: ☐ POLICY ☒ PROJECT ☐ LOC OTHER:	Y	Y	PSB0003063	1/1/2026	1/1/2027	EACH OCCURRENCE \$ 1,000,000 DAMAGE TO RENTED PREMISES (Ea occurrence) \$ 1,000,000 MED EXP (Any one person) \$ 10,000 PERSONAL & ADV INJURY \$ 1,000,000 GENERAL AGGREGATE \$ 2,000,000 PRODUCTS - COMP/OP AGG \$ 2,000,000 \$
A	AUTOMOBILE LIABILITY ☐ ANY AUTO ☐ OWNED AUTOS ONLY ☐ SCHEDULED AUTOS ☒ HIRED AUTOS ONLY ☒ NON-OWNED AUTOS ONLY	Y	Y	PSA0001125	1/1/2026	1/1/2027	COMBINED SINGLE LIMIT (Ea accident) \$ 1,000,000 BODILY INJURY (Per person) \$ XXXXXXXX BODILY INJURY (Per accident) \$ XXXXXXXX PROPERTY DAMAGE (Per accident) \$ XXXXXXXX \$ XXXXXXXX
A	UMBRELLA LIAB ☒ OCCUR EXCESS LIAB ☒ CLAIMS-MADE DED ☐ RETENTION \$ \$0	Y	Y	PSE0005966	1/1/2026	1/1/2027	EACH OCCURRENCE \$ 10,000,000 AGGREGATE \$ 10,000,000 \$ XXXXXXXX
A	WORKERS COMPENSATION AND EMPLOYERS' LIABILITY ANY PROPRIETOR/PARTNER/EXECUTIVE OFFICER/MEMBER EXCLUDED? (Mandatory in NH) If yes, describe under DESCRIPTION OF OPERATIONS below	Y/N	Y	PSW0001703	1/1/2026	1/1/2027	☒ PER STATUTE ☐ OTH-ER E.L. EACH ACCIDENT \$ 1,000,000 E.L. DISEASE - EA EMPLOYEE \$ 1,000,000 E.L. DISEASE - POLICY LIMIT \$ 1,000,000
B	Prof. Liab.	N	N	015136468	1/1/2026	1/1/2027	See Attached
C	Cyber			D3B53B260101	1/1/2026	1/1/2027	
D	A & M			SML-0000-00385817E	1/1/2026	1/1/2027	
E	Emp. Prac. Liab.			01-544-08-10	6/20/2025	6/20/2026	

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

CERTIFICATE HOLDER

CANCELLATION See Attachments

22949866

EVIDENCE OF COVERAGE

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

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ACORD 25 (2016/03)

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REFERENCES

- ☑ 2 pages maximum.
- ☑ Minimum of five (5) references. Include at least three (3) references of similar California K-12 school district projects; include the project and the role of the individual.

Client References

Joseph Dzvonik Director, Housing and Community Development Division

COUNTY OF SANTA BARBARA

p 805-568-5623 | **e** jdzvonik@countyofsb.org



Summary: B&D continues to provide advisory services to the County of Santa Barbara in the development of 100 units of affordable housing on County owned land in downtown Santa Barbara.

Mark Borison Director of Real Estate and Business Development

LOS ANGELES UNIFIED SCHOOL DISTRICT

p 213-241-6124 | **e** mark.borison@lausd.net



Summary: Al Grazioli led the successfully led LAUSD's efforts to have 185 units of affordable employee housing built in partnership with 3 different non-profit housing developers on 3 district owned sites.

Derek Knell Director of Staff Housing Development

NOVATO UNIFIED SCHOOL

p 415-493-4479 | **e** dknell@nUSD.org



Summary: B&D continues to provide real estate advisory services to Novato USD who is seeking to entitle two sites for housing. San Andreas is a 22-acres site the district intends to entitle for residential development and then sell the land at the higher, entitled market value. The district may then use the proceeds from the sale to support the financing of an affordable employee workforce housing project on a 3.7-acres site known as Meadow Annex.

John Melikian Executive Director, University Enterprises, Inc.

SACRAMENTO STATE UNIVERSITY

p 916-278-7001 | **e** john.melikian@csus.edu



Summary: B&D advised Sacramento State in developing a 30-unit employee housing community called Nine Ten Place, which represents the first faculty and staff housing option available at the university. The project was developed in response to Sacramento's dramatic rental rate increases, with typical rent in the Sacramento region increasing 19.5% in 2021—the fifth-highest increase among the nation's 50 largest metro areas.

Russ Levanway Executive Vice President at REACH

LOMPOC UNIFIED SCHOOL DISTRICT

p 877-829-5500 | **e** russ@reachcentralcoast.org



Summary: RRM partnered with Space Valley Housing Partners, the Housing Authority of the County of Santa Barbara, and Abbott Reed to support the District's exploration of workforce housing opportunities. Following a competitive RFP process, the team was selected to advance negotiations for a potential housing development at the Jupiter Avenue site. The process included site analysis, planning coordination, and early feasibility considerations to help inform future decision-making.



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