Oxnard Union High School District

Response to Request for Proposal (RFP) #728 for

Workforce Housing Development Feasibility Study and Advisory Services

Volz Enterprise Company, Inc., in association with RNT Architects and Encompass Consultant Group, Inc.

June 4, 2026






OXNARD UNION
HIGH SCHOOL DISTRICT






VOLZ
COMPANY



Table of Contents

A. Cover Letter and Executive Summary	1
B. Firm Profile and Team Qualifications	4
C. Relevant Project Experience	13
D. Technical Approach and Methodology	24
F. Fee Proposal	31
G. Insurance, Legal and Professional Standing	34
H. References	36
Attachment 1	39

A. Cover Letter and Executive Summary



June 4, 2026

Ms. Deanna Rantz
Director of Purchasing
Oxnard Union High School District
Deanna.Rantz@oxnardunion.org

RE: Proposal Workforce Housing Development RFP 728

Dear Ms. Rantz,

Volz Enterprise Company, Inc. ("**Volz Company**"), in association with RNT Architects ("**RNT**") and Encompass Consultant Group, Inc. ("**ECG**"), is honored to submit this proposal to conduct Workforce Housing Development Feasibility Study and Advisory Services for Oxnard Union High School District ("District" or "OUHSD"). We understand the District is seeking an objective, experienced advisory team to evaluate workforce housing opportunities that support employee recruitment and retention goals while navigating complex regulatory, operational, financial, and site-specific considerations. Building upon our experience advising educational institutions on workforce housing developments, our Team has developed a tailored approach that aligns with the District's Project Goals.

Below are several key qualifications that distinguish Volz Company and RNT for this engagement:

- **Deep Experience Serving California Educational Institutions:** Since its founding in 2015, Volz Company has been dedicated to delivering mission-driven real estate advisory services for educational institutions. Volz Company has worked with more than 300 educational institutions nationwide and over 70 institutions throughout California. RNT Architects brings more than 45 years of experience delivering more than 500 school district projects, with extensive expertise in campus planning, entitlement strategy, and community-sensitive design. This Team brings substantial experience navigating the complex governance and management considerations associated with public sector housing initiatives.
- **California K–12 Workforce Housing Experience:** Volz Company is currently advising LAUSD on workforce housing initiatives, including site evaluation, financial modeling, rental market analysis, regulatory framework analysis, community engagement as well as Public-Private Partnership RFP design and evaluation support. RNT recently completed the Workforce Housing Feasibility Study for Ojai Unified School District, providing experience with the planning and development considerations unique to school districts in Ventura County.
- **Comprehensive Feasibility, Financial Modeling, and Lifecycle Advisory:** Volz Company provides comprehensive advisory services from feasibility through implementation and operational transition. Our expertise includes housing market and demand analysis, financial sensitivity testing, operating pro forma analysis, and assessment of funding sources including bonds, grants, tax credits, and public-private partnership (P3) opportunities. Our recommendations are grounded in institutional mission alignment, market realities, and long-term operational sustainability.
- **P3 Advisory Experience:** Volz Company brings extensive experience advising educational institutions on P3 housing developments, including strategic planning, market and financial feasibility, developer procurement, negotiation of pre-development agreements, and implementation support. Recent and current P3 housing engagements include Los Angeles Community College District, Napa Valley College, San Bernardino Community College District Santa Monica College, and Santa Rosa Junior College.

- **Local Presence and Accessibility:** Volz Company is headquartered in Irvine, California, with additional offices in San Diego and San Francisco. RNT's Ventura office is located approximately 25 minutes from Rancho Campana High School, providing the Team with strong familiarity with Ventura County, local conditions, and convenient accessibility to support ongoing coordination, stakeholder meetings, and site visits.
- **Regulatory and Entitlement Strategy Expertise:** The Team has extensive experience navigating California's complex regulatory environment, including CEQA, local planning and entitlement processes, and evolving state housing legislation such as AB 2295 and AB 1021.
- **Local Civil Engineering Expertise:** The Team is strengthened by **Encompass Consultant Group (ECG)**, a Ventura County-based civil engineering and land surveying firm with extensive experience supporting public educational facilities and complex site development projects throughout the region. Notably, ECG (under a predecessor firm) designed Rancho Campana High School, providing unique familiarity with existing campus infrastructure, utilities, circulation, and site conditions.
- **Team Collaboration:** Volz Company and RNT are currently collaborating on Ventura College's affordable student housing development funded through California's SB 169 Student Housing Grant Program. This partnership demonstrates our ability to work collaboratively on complex educational housing initiatives requiring thoughtful planning, stakeholder coordination, and implementation strategy.
- **Objective, Independent Advisory Services:** Volz Company is not a developer and serves exclusively as an objective, fee-for-service advisor.
- **Certified Small Business Enterprise:** Volz Company is a 100% woman-owned firm proudly certified as a Small Business Enterprise (SBE). RNT is a certified as Minority Business Enterprise (MBE) and SBE.

We anticipate completing the proposed scope of services within approximately seven (7) months following Notice to Proceed. A detailed project schedule is included in this proposal and is designed to support timely decision-making and implementation planning.

Thank you for your consideration of our proposal. We appreciate the opportunity to support OUHSD in examining workforce housing opportunities that advance employee recruitment, retention, and long-term District goals. We welcome the opportunity to discuss our approach further and answer any questions. Please feel free to contact me at (312) 909-1340 or avolz@volzcompany.com.

Sincerely,

Ann Volz

Ann Volz, President
Volz Company

cc: Aejin Yoon, Vice President, Volz Company
Tyson Cline, Principal, RNT Architects

B. Firm Profile and Team Qualifications



B. Firm Profile and Team Qualifications

VOLZ COMPANY

Founded in 2015, Volz Enterprise Company, Inc. (Volz Company) is a real estate and operational advisory and project/program management firm. We are organized to serve mission-driven organizations, not-for-profit organizations, educational institutions, and the development industry on the advancement of their strategic real estate, operational, and business plan objectives. Our services are holistic in nature and purposely intended to suit the specific needs of our clients to achieve their measurements of success.

Through an unyielding commitment to mission, vision, values and business model, Volz Company empowers our clients to make the most informed decisions. Volz Company's philosophy mandates that the most appropriate level of expertise is provided to every client based on their unique needs and aspirations. Since our inception, we have maintained steadfast alliances with firms and people we respect and trust to uphold our commitment for successful outcomes through well-coordinated, collaborative and efficient processes.

Volz Company is headquartered in Irvine, California. Its regional offices are located in San Francisco, California; Santa Rosa, California, San Diego, California, and Chicago, Illinois.

Owner's Representation, Project Management, and Real Estate Advisory Services

Strategy Development
Market and Feasibility Studies
Capital Improvement Analysis, Scoping, and Budgeting
Financial Analysis
Professional Services and Developer Procurement
Transaction Negotiations
Public-Private Partnership Advisory
Oversight of Design and Construction
Owner's Representation
Close-Out Procedures

To learn more, visit volzcompany.com.

2015
Year Volz Company was organized to serve mission-driven organizations and provide real estate strategies from conception through implementation

58,000+
Faculty, staff, and student housing beds Volz Company professionals analyzed and/or implemented

300+
Educational institutions that have worked with Volz Company professionals

$500M+
Budget currently managed as owner's representative

100%
Women-owned firm
Small Business Enterprise certified

150+
Combined years of experience

25
Professionals working at Volz Company

RNT Architects

RNT has a total of 40 permanent employees including 15 Licensed Architects, and a Certified Planner. Since RNT's founding in 1980, our firm has earned a national reputation for providing our clients with buildings and environments that surpass expectations and needs. RNT's mission is to design meaningful places that support human habitation, culture, and a positive quality of life. All of our work is done with the intention of increasing benefits to the local community. We serve Central and Southern California and beyond from our offices in San Luis Obispo, Ventura, and San Diego.

RNT is a full-service architectural firm (S-Corporation) with experience in a wide variety of project types. With over 100 awards in architectural excellence and sustainable design, the firm is particularly known for educational, civic, and institutional projects, as well as private sector projects that benefit the larger community.

The beliefs of RNT are firmly rooted in creating meaningful and sustainable environments that elegantly meet or exceed our clients' objectives. We strive to provide a rational method to problem solving with artistic vision and grace. RNT's collaborative approach toward architectural design and programming, urban design, community planning, industrial and graphic design, creates places that transform communities and enrich lives.

Experience

RNT has provided architectural and planning services for various local and regional affordable housing and unique residence type projects. Our team is highly adept at working with historic campus buildings and experienced in modernizing them to new and unique community uses.

With over 45 years of experience working on public and private projects throughout the state of California, we offer unique experience working on educational and community serving facilities along with affordable housing to support unique user groups.

Firm Name:
Roesling Nakamura Terada Architects, Inc.

Organization:
S-Corporation

Address:
285 N Ventura Avenue
Ventura, CA, Suite 102, 93001

Phone:
805.626.5330

Website:
https://www.rntarchitects.com

Point of Contact:
Tyson Cline, Principal
285 N Ventura Avenue,Suite 102, 93001
805.626.5330

Year Founded:
1980

Date Incorporated:
1/1/1988

State of Incorporation:
CA

100+ TOTAL DESIGN AWARDS

59 LEED PROJECTS

13 AIA AWARD WINNING PROJECTS

44 LEED GOLD & PLATINUM PROJECTS

10 NET-ZERO PROJECTS

500+ SCHOOL DISTRICT PROJECTS

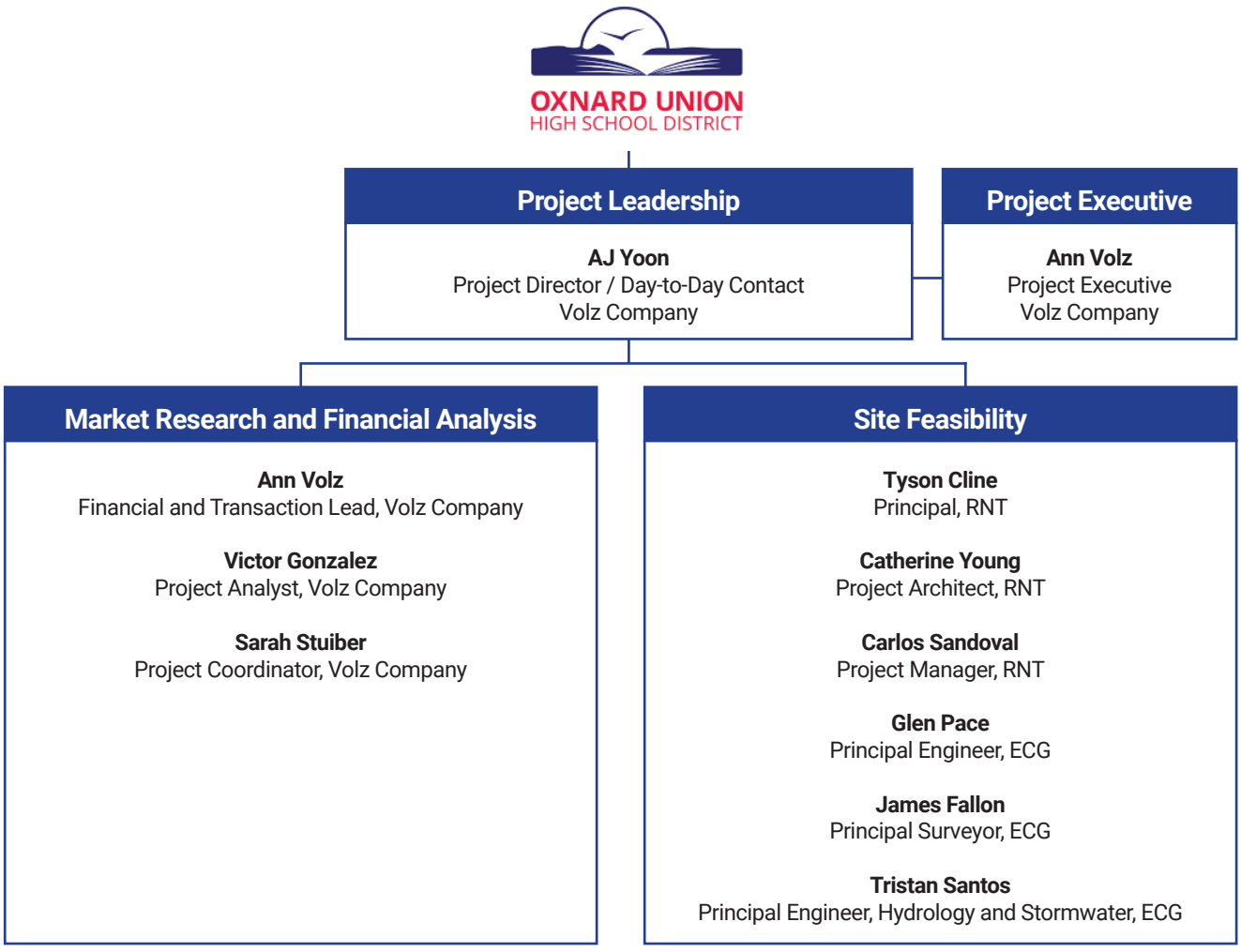
Encompass Consultant Group, Inc. Engineers

Encompass Consultant Group, Inc. (ECG) is a local, employee-owned consulting firm providing a comprehensive range of civil engineering and land surveying services for all types of public and private improvement projects. Our team includes registered civil engineers, licensed land surveyors, and California Certified QSDs, supported by an experienced design and survey staff. We bring extensive public facility improvements experience, from upgrades to existing sites to full new-construction projects, offering multidisciplinary capabilities to address essential design aspects including utilities, grading and drainage, planning, and coordination with city and county agencies. The ECG team, whilst under a different firm, designed the Rancho Campana High School.

ECG is well-equipped to meet site civil design needs, as well as water supply, sewer, and storm drain systems. We provide detailed site analyses for grading, access, ADA compliance, and parking lots. With a growing emphasis on sustainable and LEED-aligned design strategies, our team integrates green infrastructure solutions such as bioswales, biofilters, water-recycling systems for irrigation, and permeable pavements. Our depth in hydrology and stormwater quality ensures every project meets MS4 permit requirements and regional water quality standards, delivering environmentally responsible and cost-effective results.

Organizational Chart

Key Team Members and Project Consultants for OUHSD





Ann Volz

President, Volz Company

Ann has over 30 years of real estate experience in feasibility studies, procurement, program/project management, development advisory, programming, and property management.

With more than 30 years of real estate experience, Ann has been involved in nearly all aspects of development from early feasibility to property management. This includes planning and implementation services with over 200 educational institutions and operational advisory services for more than 20 professional services firms and not-for-profit agencies. She is recognized for her respectable manner with which to strategically advance outcomes and sustainable growth through straight-forward communication embedded in collaboration and empathy.

She founded Volz Company in 2015 to work with people like you who are dedicated to making a positive influence in the world through the built environment. Since inception, the firm has been focused on and continually advances mission-based outcomes.

Her prior background includes leadership positions at an international student housing firm (Vice President for Capital Projects), national program management firm (Vice President) and an international architecture firm (Senior Vice President) as well as management team of three $200M+ new developments, a significant mall renovation project, and a 52-story urban mixed use building.

REPRESENTATIVE PROJECT EXPERIENCE

Los Angeles Unified School District, Los Angeles, CA
Workforce housing real estate advisory services, preparation & evaluation of a request for proposal, negotiation of best deal(s)

Los Angeles Community College District, Los Angeles, CA
Affordable student market and demand analysis, P3 financial modeling, and P3 procurement process support, rental rate analysis, financial sensitivity analysis

Foothill-De Anza Community College District and Mountain View Whisman School District, Mountain View, CA
Faculty and staff housing advisory services

Ventura College, Ventura, CA
Project management and 24/7 campus transition advisory services for affordable student housing in partnership with RNT

Santa Monica College, Santa Monica, CA
Student and faculty/staff housing market and demand analysis; P3 financial modeling, and P3 procurement process

Santa Rosa Junior College, Santa Rosa, CA
Student and faculty/staff housing market and demand analysis; P3 financial modeling, P3 procurement process, transaction advisory services, P3 implementation services, and operational advisory services

EDUCATION

Saint Mary's College, Notre Dame, Indiana, Bachelor of Business Administration with an emphasis in Finance and Marketing & Bachelor of Communications

ASSOCIATIONS

Urban Land Institute
National Association of College and University Business Officers
Society of College and University Planners
Association of College and University Housing Officers
P3 Higher Education Summit
Interface On-Campus Student Housing
Commercial Real Estate Women
International Council of Shopping Centers
Society of Marketing Professional Services

CONTACT

Email: avolz@volzcompany.com
Mobile: (312) 909-1340

AWARDS

GlobeSt. Women of Influence Awards 2023
Southern California Women Leading Real Estate 2023

RECENT PRESENTATIONS

Panelist - Refining the Playbook: LAUSD's Evolving Workforce Housing Development Model, Student & Workforce Housing Development Conference & Expo, May 2026

Moderator - Intersegmental Collaboration in Student Housing: Building Pathways Across Systems, Building for Tomorrow: Student Housing Strategies from Design to Residential Life, California Community Colleges Chancellor's Office, November 2025

Panelist - We Have Bond Money for Affordable Housing – Now What?, Student & Workforce Housing Development Conference & Expo, April 2025



Aejin (AJ) Yoon

Vice President, Volz Company

With more than 15 years of related experience, AJ is adept at partnering with leaders and stakeholders to clarify business direction, align strategies and drive solutions that serve team member, organization, and community needs.

AJ is a proven leader in strategic planning, adept at integrating market data, financial analysis, and diverse stakeholder perspectives to develop actionable, high-impact strategies for purpose-driven organizations. With extensive experience in advising over 50 educational institutions and more than 15 professional services firms and not-for-profit agencies, she specializes in aligning organizational goals with market realities to drive sustainable, mission-driven outcomes.

As a real estate consultant, AJ leads strategic objectives alignment sessions, ensuring leadership teams and stakeholders collectively define priorities while drawing from market trends, financial assessments, and qualitative insights. She conducts in-depth qualitative research, including focus groups and individual interviews, to assess current and aspirational thinking, while incorporating quantitative market and financial data to create strategic plans with measurable objectives, defined roles, and clear implementation timelines. By translating market insights and financial feasibility findings into strategic direction, she enables organizations to anticipate challenges, seize opportunities, and remain adaptable in evolving environments.

REPRESENTATIVE PROJECT EXPERIENCE

Los Angeles Unified School District, Los Angeles, CA
Workforce Housing real estate advisory services, preparation & evaluation of a request for proposal, negotiation of best deal(s)

Pflugerville Independent School District, Pflugerville, TX
Teacher housing market and demand study

El Camino Health, Mountain View, CA
Workforce housing needs assessment

San Bernardino Community College District, San Bernardino, CA
Housing market and demand analysis; highest and best use analysis; P3 financial modeling, P3 procurement process, transaction advisory services for a mixed-use development (student, workforce and Affordable housing)

Foothill-De Anza Community College District, Cupertino and Los Altos, CA
Faculty/staff and student housing market and demand analysis, financial analysis, site analysis, P3 advisory

Rio Hondo College, Whittier, CA
Student and family housing feasibility planning, real estate analysis, market and demand analysis, financial analysis

EDUCATION

Swarthmore College, Bachelor of Arts, Sociology and Anthropology

ASSOCIATIONS

Urban Land Institute
Commercial Real Estate Women

CONTACT

Email: ayoon@volzcompany.com
Mobile: (650) 300-9375

RECENT PRESENTATION

Moderator - Refining the Playbook: LAUSD's Evolving Workforce Housing Development Model, Student & Workforce Housing Development Conference & Expo, May 2026

Presenter - Perseverance Pays off - Connecting a Decade of Data Supporting Student Success, Northwest Association of College and University Housing Officers (NWACUHO), February 2026

Moderator - Legacy Village: A Collaborative Blueprint for Workforce, Student, and Affordable Living, California Housing & Community Development Conference & Expo, December 2025

Moderator - Pathways in Practice: Multiple Approaches for Campus Housing Planning, Building for Tomorrow: Student Housing Strategies from Design to Residential Life, California Community Colleges Chancellor's Office, November 2025

Moderator - From Market-Rate to Mission-Driven: FHDACCD's Strategic Acquisition for Affordable Student Housing, Community College Facility Coalition (CCFC), November 2025

Emcee - Leveraging District Assets to Create Livable Communities, LAUSD Workforce Housing Industry Forum, August 2025

Moderator - Education Workforce Housing: Addressing the Crisis, Webinar, January 2025



Victor Gonzalez

Project Analyst,
Volz Company

Education
University of California, Berkeley, Master of Real Estate Development + Design
Universidad Autonoma de Aguascalientes, Bachelor of Architecture
Universidad Autonoma de Mexico, Investment Project Evaluation
Tecnologico de Monterrey, Construction Management

Certification
ARGUS Enterprise Certified (ID: 8003)

Drawing on his background in architecture, development, and financial analysis, Victor examines development scenarios, assesses market conditions, and develops financial models to support mission-driven organizations' strategic planning and capital investment decisions.

Victor integrates financial modeling, data driven planning, and urban development insight to unlock value in complex and transformative real estate projects for mission driven organizations. He develops pro forma models, analyzes operating performance, and evaluates various financing strategies including institutional debt and public private partnership structures.

REPRESENTATIVE PROJECT EXPERIENCE

- El Camino Health, Workforce Housing Needs Assessment, Mountain View, CA
- Los Angeles Community College District, Financial Analysis for P3 Below-Market and Affordable Student Housing Development, Los Angeles, CA
- San Bernardino Community College District, P3 Mixed-Use Development Project Management, San Bernardino, CA
- Santa Monica College, Financial Analysis for P3 Below-Market and Affordable Student Housing Development, Santa Monica, CA
- Napa Valley College, Financial Analysis for P3 Faculty/Staff and Student Housing Project, Rental Market Analysis, Napa, CA



Sarah Stuiber

Project Coordinator,
Volz Company

Education
University of Illinois Urbana-Champaign
Bachelor of Science, Marketing

Sarah supports market and demand analyses for student, faculty, and staff housing initiatives. She assists with market research, data analysis, and strategic planning efforts to help institutions better understand housing needs and market conditions. Her work includes developing online surveys, analyzing findings alongside employment/enrollment and demographic data, and assessing local rental market conditions and competitive dynamics. Sarah also supports stakeholder engagement and focus group facilitation by documenting key themes and synthesizing diverse perspectives into actionable insights. By integrating qualitative and quantitative research, Sarah contributes to data-informed recommendations and clear, organized deliverables that support institutional housing planning and decision-making.

REPRESENTATIVE PROJECT EXPERIENCE

- El Camino Health, Workforce Housing Needs Assessment, Mountain View, CA
- La Sierra University, Faculty/Staff Housing Market and Demand Analysis, Riverside, CA
- Santa Monica College, Housing Market and Demand Analysis, Santa Monica, CA
- Modesto Junior College, Housing Market and Demand Analysis, Modesto, CA
- San Juan College, Housing Market and Demand Analysis, Farmington, NM



Tyson Cline, AIA

Principal in Charge,
RNT Architects

Professional Registration
Licensed Architect, CA, No. C-34436

Education
Bachelor of Architecture, New School of Architecture and Design

Tyson is a Principal with Roesling Nakamura Terada Architects, Inc. (RNT) and has been leading RNT's Ventura office since 2006. Tyson has a passion for exploring creative and contextually appropriate design solutions while engaging sustainable and energy efficient strategies that work together to create a true sense of place. Tyson is very skilled in minimizing maintenance and operational expenditures and implements design features that reduce costs. He has broad project type experience in both architectural design and urban planning as well as residential design. He has completed several custom homes in Ventura County. Tyson is a past member of the City of Ventura's Design Review Committee and Historic Preservation Committee for over 11 years and is currently a member of the Ventura County Cultural Heritage Board.

REPRESENTATIVE PROJECT EXPERIENCE

- Ojai Unified School District, Workforce Housing Feasibility Study, Ojai, CA
- Housing Authority of the City of San Buenaventura, Redevelopment of Westview Village (320 units), Ventura, CA
- Channel Islands Building and Development Partners, Inc.
- Palm and Poli Infill Housing, Ventura, CA
- Thompson Mixed-Use Development, Ventura, CA*
- Cedar Street Patio Housing, Ventura, CA*
- 4th and B Downtown Oxnard Mixed-Use Project, Oxnard, CA
- Swift Property Mixed Use Development Study, Oxnard, CA
- Metropolitan Water District of Southern California, CRA Employee Village Enhancements Master Plan, Various Locations, CA
- City of Agoura Hills, Recreation, Administration and Event Center, Agoura Hills, CA
- City of San Buenaventura, Housing Authority Office Remodel, Ventura, CA

*Non-RNT project



Catherine Young, NCARB, LEED AP

Project Architect,
RNT Architects

Professional Registration
Licensed Architect, CA, No. C-34440
National Council of Architectural Registration Boards
U.S. Green Building Council

Education
Master of Architecture, University of Oregon School of Architecture

Catherine is an Associate with RNT and has 18 years of project experience overseeing design and subconsultant teams through all phases of the architectural and building processes, from programming to construction observation. She works closely with clients and team members to bring the project's vision to life on time and within budget. From the beginning of her career Catherine has pursued the most effective and high-performance green building strategies for every project and currently co-leads RNT's Responsive Design Focus Group. She has been with RNT's Ventura office since 2008. She has experience working on housing projects ranging from affordable to veteran to student housing as well as over 15 years working with DSA including Ojai USD's bond program projects.

REPRESENTATIVE PROJECT EXPERIENCE

- Ojai Unified School District, Workforce Housing Masterplan and On-Call Architecture Services, Ojai, CA
- Rio School District, On-Call Architectural Services, Oxnard, CA
- Pleasant Valley Unified School District, On-Call Architectural Services, Pleasant Valley, CA
- Montecito Union SD, On-Call Architects, Montecito, CA
- Ventura Unified School District On-Call Architects, Ventura, CA
- Ventura College: East Campus Phase 1, Santa Paula, CA
- City of Oxnard - Senior Community Center Concept Study
- Ventura Veterans Housing, Ventura, CA
- Housing Authority of the City of San Buenaventura: Housing Authority Office



Carlos Sandoval

Project Manager,
RNT Architects

Education
Bachelor of Architecture, New School of Architecture and Design

Carlos Sandoval brings ten years of architectural experience with a focus on education-sector projects, including K-12 and higher education facilities. His work with state agencies such as DSA and OSHPD has equipped him with a deep understanding of compliance, permitting, and regulatory approvals, ensuring a smooth process for school district developments.

As a Project Manager, Carlos specializes in coordinating multidisciplinary teams, engaging stakeholders, and leading projects from initial planning through construction documentation. His experience in educational facility design, adaptive reuse, and renovation projects translates seamlessly into the planning and execution of workforce housing developments, where efficiency, cost-effectiveness, and functionality are critical.

REPRESENTATIVE PROJECT EXPERIENCE

- Oxnard Union High School District, Modernization / Master Planning Services | Oxnard, CA*
- Camarillo Academy of Progressive Education (CAPE) Charter School, Portable Classroom Additions and Site Upgrade, Camarillo, CA*
- Newhall School District, Long Range Facilities Master Plan, Valencia, CA*
- Santa Paula Unified School District | Santa Paula High School Bryden Gym & Multipurpose Facility
- Ventura Unified School District, ATALS Classroom Renovations, Ventura, CA
- Ventura Unified School District, Long Range Facilities Master Plan, Ventura, CA*
- Ventura Unified School District, Lemon Grove K-8 Classroom Conversion | Ventura, CA*
- Ventura Unified School District, ATLAS K-8 Classroom Conversion | Ventura, CA*

*Prior to joining RNT



Carlos Sandoval

Principal Engineer,
ECG

Professional Registration
Professional Engineer, CA, 61468

Education
B.S. Civil Engineering, Brigham Young University, Provo, Utah

Glen Pace is a Principal Engineer with nearly 30 years of experience leading the planning, design, and management of civil engineering projects across Ventura, Santa Barbara, and Los Angeles Counties for both public- and private-sector clients. He oversees a broad portfolio of private development, institutional, and public works projects involving the design and construction of on and off-site improvements. His expertise includes civil design for new and upgraded institutional facilities; infrastructure for master-planned communities; regional parks; recreational fields and courts; and roadway, streetscape, grading, and drainage projects. Glen collaborates extensively with architects, landscape architects, geotechnical engineers, and other professionals to deliver fully integrated design to seamlessly coordinate civil, architectural, landscape, lighting, and streetscape elements to achieve successful, high-quality project outcomes.

REPRESENTATIVE PROJECT EXPERIENCE

- Santa Paula High School Gym Rebuild, Santa Paula, CA
- Fillmore Library Expansion, County of Ventura, Fillmore, CA
- Ventura County Harbor Department, Channel Islands Harbor Administrative Building Replacement, Oxnard, CA
- CSUCI Arroyo Hall Outdoor Recreation Center, Camarillo, CA
- Ojai Valley School, New Arts & Commons Building, Ojai, CA

C. Relevant Project Experience



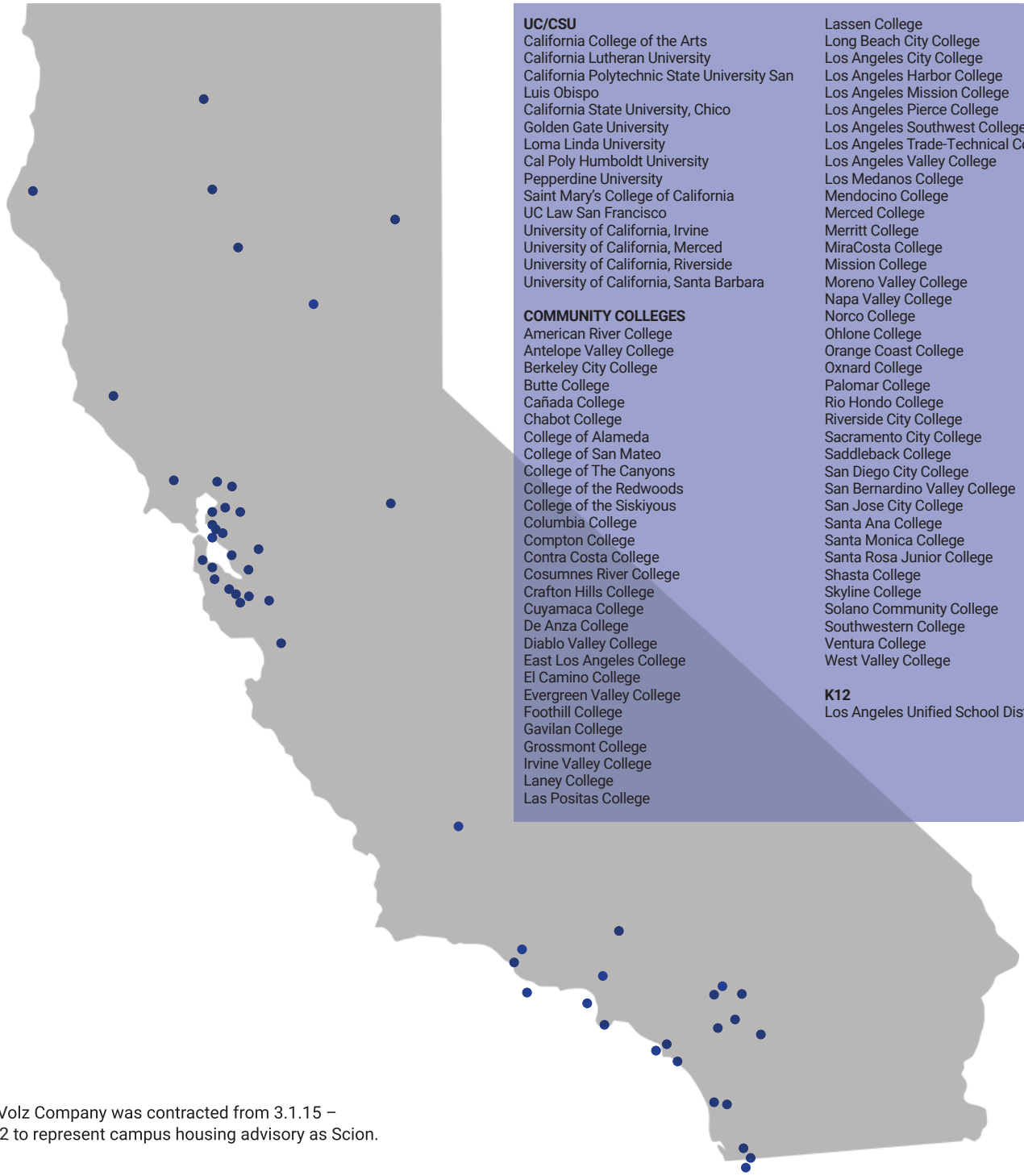
C. Relevant Project Experience

The Team brings direct, relevant experience advising California educational institutions and public institutions on workforce and affordable housing initiatives, from feasibility and regulatory analysis through implementation and start-up operations.

Consultant	Volz Company and RNT	Volz Company						RNT			
Projects	**Ventura College**	**Los Angeles USD Housing Initiative**	**Legacy Village at SBCCD**	**Polly O'Meara Doyle Hall Santa Rosa Junior College**	**Scholars Row at The Sevens (in partnership with Mountain View Whisman School District)**	**UC Riverside and Riverside City College**	**The Peaks at Columbia College**	**Ojai USD Workforce Housing**	**Ventura Veterans Housing**	**Metropolitan Water District**	**Westview Affordable Housing**
Location	Ventura, CA	Los Angeles, CA	San Bernardino, CA	Santa Rosa, CA	Mountain View, CA	Riverside, CA	Sonora, CA	Ojai, CA	Ventura, CA	San Bernardino County, CA	Ventura, CA
California Public Educational Institution (K12, Community College)	X	X	X	X	X	X	X	X			
Workforce/Affordable Housing for Public Sector Institution	X	X	X	X	X	X	X	X	X	X	X
CA Regulatory Environment (CEQA, Local Planning, Innovative State Housing Legislation/Streamlined Approval Mechanism)	X	X	X	X		X	X	X	X	X	X
Feasibility Study		X	X	X	X	X	X	X	X	X	X
Feasibility through Start-up Operations				X	X	X	X	X	X	X	
Public-Private Partnership		X	X	X	X		X	X	X		
Complex Governance and Management Considerations for Public Sector Housing	X	X	X	X	X	X	X	X	X	X	X
Community Engagement	X	X	X	X	X	X	X	X	X	X	X

Volz Company Experience

Volz Company professionals have worked with over 70 educational institutions in the State of California. Our previous work includes experience working with multi-disciplinary teams and major developers in the local and regional real estate market. We have keen understanding of requirements of the Division of State Architect ("DSA") as well as CEQA. Prior to construction, we advise on the transaction documents, which entailed ensuring that the development partners adhered.



UC/CSU
California College of the Arts
California Lutheran University
California Polytechnic State University San Luis Obispo
California State University, Chico
Golden Gate University
Loma Linda University
Cal Poly Humboldt University
Pepperdine University
Saint Mary's College of California
UC Law San Francisco
University of California, Irvine
University of California, Merced
University of California, Riverside
University of California, Santa Barbara

COMMUNITY COLLEGES
American River College
Antelope Valley College
Berkeley City College
Butte College
Cañada College
Chabot College
College of Alameda
College of San Mateo
College of The Canyons
College of the Redwoods
College of the Siskiyous
Columbia College
Compton College
Contra Costa College
Cosumnes River College
Crafton Hills College
Cuyamaca College
De Anza College
Diablo Valley College
East Los Angeles College
El Camino College
Evergreen Valley College
Foothill College
Gavilan College
Grossmont College
Irvine Valley College
Laney College
Las Positas College
Lassen College
Long Beach City College
Los Angeles City College
Los Angeles Harbor College
Los Angeles Mission College
Los Angeles Pierce College
Los Angeles Southwest College
Los Angeles Trade-Technical College
Los Angeles Valley College
Los Medanos College
Mendocino College
Merced College
Merritt College
MiraCosta College
Mission College
Moreno Valley College
Napa Valley College
Norco College
Ohlone College
Orange Coast College
Oxnard College
Palomar College
Rio Hondo College
Riverside City College
Sacramento City College
Saddleback College
San Diego City College
San Bernardino Valley College
San Jose City College
Santa Ana College
Santa Monica College
Santa Rosa Junior College
Shasta College
Skyline College
Solano Community College
Southwestern College
Ventura College
West Valley College

K12
Los Angeles Unified School District

Note: Volz Company was contracted from 3.1.15 – 4.30.22 to represent campus housing advisory as Scion.

Los Angeles Unified School District Workforce Housing Initiative
Los Angeles, CA

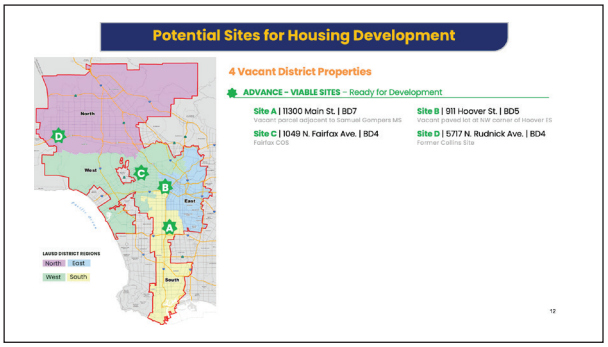
Project Highlights

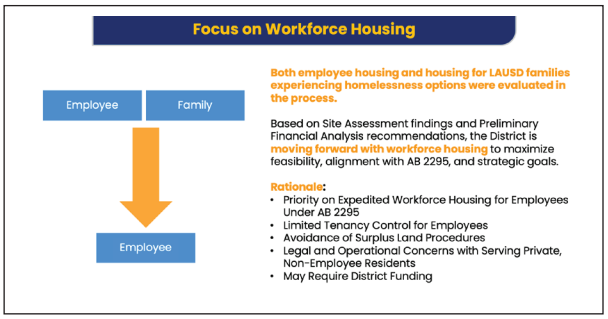
- ☑ Workforce Housing
- ☑ California TK-12
- ☑ Experience with California Regulatory Environment
- ☑ Feasibility through Procurement
- ☑ Comprehensive Advisory Services
- ☑ Financial Modeling; Innovative Funding Mechanism
- ☑ P3 Advisory Services
- ☑ Complex Governance and Management Considerations
- ☑ Community Engagement

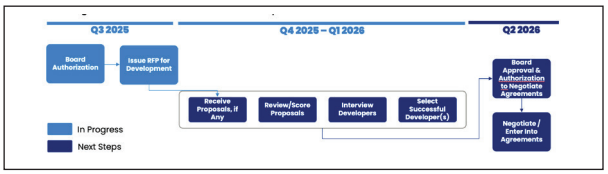
Recognizing the connection between housing stability, workforce sustainability, and student success, LAUSD launched a districtwide Housing Initiative to evaluate the feasibility of developing attainable housing on underutilized District-owned sites. Building on the District's existing 185 employee housing units, the initiative aims to create a strategic framework for long-term, financially sustainable housing that supports employee retention, work-life balance, and community well-being.

Volz Company, in association with an architectural firm, led a structured, data-driven process to advance LAUSD's housing goals. The team evaluated nine District-owned sites for zoning, infrastructure, and development potential. Financial pro forma and sensitivity models were created to test ownership, financing, and delivery options. Volz Company also led stakeholder and community engagement and worked closely with LAUSD leadership throughout the process. Using the market and site data, Volz Company developed the District's Request for Proposals for Housing Development (RFPHD) in coordination with LAUSD's leadership, legal, and procurement teams. The engagement produced a clear roadmap for expanding LAUSD's employee housing portfolio.

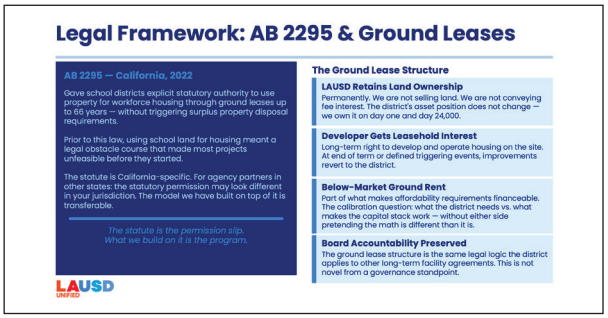
Volz Company is currently supporting the Los Angeles Unified School District through the procurement phase to select qualified development partners capable of delivering high-quality, attainable employee housing. During this phase, Volz Company will assist the District in negotiating agreements to ensure financial, operational, and programmatic alignment with District objectives.











Client/Owner
Issam Dahdul
Director of Facilities, Planning & Development, Facilities Services Division, Los Angeles Unified School District
Email: issam.dahdul@lausd.net
Phone: (213) 241-4811

San Bernardino Community College District Legacy Village, P3 Mixed-Use Development (Workforce and Affordable Housing Included)

San Bernardino, CA

Project Highlights

- ☑ Workforce Housing
- ☑ Experience with California Regulatory Environment
- ☑ Feasibility through P3 Implementation
- ☑ Comprehensive Advisory Services
- ☑ Financial Modeling; Innovative Funding Mechanism
- ☑ P3 Advisory Services
- ☑ Complex Governance and Management Considerations
- ☑ Community Engagement



The San Bernardino Community College District (SBCCD) engaged Volz Company to address the pressing housing crisis at San Bernardino Valley College (SBVC) and Crafton Hills College (CHC), two institutions under its governance. The initiative aimed to improve student success, retention, and access to basic needs by developing high-quality, affordable housing options tailored to the needs of its diverse student population, while supporting long-term financial sustainability.

Volz Company conducted a comprehensive market and demand analysis, incorporating strategic objectives alignment workshops, student focus groups, stakeholder interviews, and online surveys. The study also included an off-campus rental market assessment, providing critical insights into quantified housing demand, unit type preferences, rent tolerance, and potential financing methods. Simultaneously, Volz Company collaborated with an architect and legal counsel to evaluate site options and review zoning and legal requirements. This study assessed the feasibility of developing affordable housing, considering site capacity, financial viability, and alignment with the District's strategic goals.

Leveraging these findings, SBCCD acquired a 14.9-acre site (Site K) adjacent to SBVC as the location for the proposed housing development. Collaborating with an architect, Volz Company guided the District through a massing study, concept development, and cost estimation. The team also conducted financial sensitivity analyses and total cost of ownership evaluations to inform long-term decision-making. Additionally, Volz Company facilitated stakeholder engagement, community outreach, and industry forums to align the project with the needs of both students and the local community.

To advance the project, SBCCD opted for a public-private partnership (P3) model, with Volz Company managing the procurement and negotiation process. The firm developed a comprehensive Request for Qualifications and Pre-Development Agreement Terms to attract qualified development partners, ensuring compliance with public sector regulations and alignment with the District's goals of affordability, accessibility, and quality. Volz Company collaborated with District leadership to define project objectives, evaluation criteria, and selection processes, conducting financial modeling, market analysis, and operational planning to assess proposals. With Volz Company's expertise, the District maintained transparency and control, creating an attractive opportunity for developer participation and establishing a foundation for transformative, student-centered housing solutions.

Volz Company is currently providing project management services as the project advances through pre-development.

Client/Owner

Farrah Farzaneh, CCM, Assoc. DBIA, LEED AP BD+C, ENV SP
Executive Director, Facilities Planning, Sustainability & Construction
San Bernardino Community College District
Email: ffarzaneh@sbccd.edu
Phone: (310) 633-1090

Foothill-De Anza Community College District Employee Housing
Cupertino and Los Altos, CA

Project Highlights

- ☑ Workforce Housing
- ☑ Experience with California Regulatory Environment
- ☑ Feasibility through Ongoing Advisory Services through Operational Phase
- ☑ Comprehensive Advisory Services
- ☑ Financial Modeling; Innovative Funding Mechanism
- ☑ P3 Advisory Services
- ☑ Complex Governance and Management Considerations
- ☑ Community Engagement



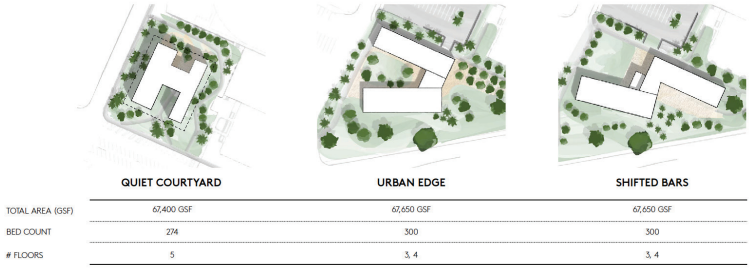
Volz Company conducted a district-wide housing market, demand, and financial feasibility study for student, faculty, and staff housing to guide the strategic use of approximately $200 million in Measure G bond funds dedicated to housing initiatives. As part of this effort, Volz Company advised the District on its workforce housing strategy, including the acquisition of 50 apartment homes within the Scholars Row at The Sevens development to support faculty and staff recruitment and retention in Silicon Valley's high-cost housing market. Volz Company assisted with market analysis, financial feasibility, opportunity evaluation, strategic alignment with bond objectives, and implementation planning. The initiative includes a strategic partnership with the Mountain View Whisman School District.

Client/Owner
Christopher F. Dela Rosa
Vice Chancellor, Business Services
Foothill-De Anza Community College District
delarosachristopher@fhda.edu | (650) 949-6201

Ventura College Affordable Student Housing
Ventura, CA

Project Highlights

- ☑ Experience with California Regulatory Environment
- ☑ Comprehensive Advisory Services
- ☑ Complex Governance and Management Considerations
- ☑ Community Engagement



	QUIET COURTYARD	URBAN EDGE	SHIFTED BARS
TOTAL AREA (GSF)	67,400 GSF	67,650 GSF	67,650 GSF
BED COUNT	274	300	300
# FLOORS	5	3, 4	3, 4

Volz Company and RNT Architects are currently collaborating on Ventura College's affordable student housing development, funded through California's SB 169 Higher Education Student Housing Grant Program and contribution from the College. The team is supporting the College in advancing a 313-bed student housing community designed to expand affordability, equity, access, and campus connection for Ventura College students. As Housing Advisor and CM/PM partner alongside Gafcon, Volz Company is helping guide the project from planning through implementation, with a focus on stakeholder coordination, budget and schedule alignment, risk management, long-term operational considerations, and successful integration of a 24/7 residential community into the campus fabric. RNT Architects contributes architectural planning, campus integration, and design expertise as part of the architectural team, supporting a project intended to meet students' basic needs while creating long-term value for the College and District.

Client/Owner
James Zavas
Vice President, Business and Administrative Services
Ventura College
Email: jzavas@vcccd.edu
Phone: (805) 289-6114

Volz Company Projects Currently in Operation









Polly O'Meara Doyle Hall
Santa Rosa Junior College
Scope:

- Faculty/Staff Housing Feasibility Study*
- Financial Analysis
- P3 Advisory Services
- Grant Application Development and Advisory Services
- P3 Procurement, Developer Negotiations, Transaction Advisory Services
- Project Management through Implementation
- Operational Advisory Services

*Under the contract with Scion

Client/Owner
Dr. Pedro Avila
Superintendent / President, Gavilan College
(Former Vice President of Student Services / Assistant Superintendent at Santa Rosa Junior College)
Email: pedroavila@gavilan.edu
Phone: (408) 848-4712

North District 2
UC Riverside and Riverside City College
Scope:

- Housing Feasibility Study*
- Financial Analysis
- Grant Application Development and Advisory Services
- Intersegmental Partnership Advisory Services
- Project Management through Implementation
- Operational Advisory Services
- Rental Rate Analysis

*Under the contract with Scion

Client/Owner
Hussain Agah
Associate Vice Chancellor, Facilities Planning & Development
Riverside Community College District
Email: hussain.agah@rccd.edu
Phone: (951) 222-8871

Scholars Row at The Sevens (in partnership with Mountain View Whisman School District)
Foothill-De Anza Community College District
Scope:

- Faculty/Staff Housing Feasibility Study
- Financial Analysis
- P3 Advisory Services
- Grant Application Development and Advisory Services
- Acquisition Advisory Services
- Project Management through Implementation
- Operational Advisory Services
- Rental Rate Analysis

Client/Owner
Christopher F. Dela Rosa
Vice Chancellor, Business Services
Foothill-De Anza Community College District
Email: delarosachristopher@fhda.edu
Phone: (650) 949-6201

The Peaks
Columbia College
Scope:

- Housing Feasibility Study
- Financial Analysis
- Grant Application Development and Advisory Services
- Property Management Services
- Rental Rate Analysis

Client/Owner
Lena Tran, Ed.D., MBA
Interim Chancellor
Yosemite Community College District
Email: tranl@yosemite.edu
Phone: (209) 588-5115

RNT Experience

RNT's work experience is ideally suited for this project and scope of work. Our project experience ranges from adaptive reuse of historic concrete buildings including school buildings, affordable housing for specific user types including workforce housing, cultural and community serving facilities design and feasibility/master planning efforts that include financial proformas based design.

Workforce and Affordable Housing
Ojai Unified School District – Workforce Housing
Study of a 93-unit teacher / workforce housing project

Ventura Veterans Housing
Design through construction of 120 affordable housing units for local veterans including 7,000 sqft of community use space

Metropolitan Water District Workforce Housing Master plan
Design of four small villages with their associated workforce housing associated with the pump/lift stations along the Colorado River aqueduct

School District Projects
Ojai Unified School District – Matilija Dining Hall
Outreach design and construction of the new 6,400 square foot dining hall

Ojai Unified School District – Nordhoff HS Library Modernization
Modernization and redesign of the original campus library to include breakout areas and a maker space

Adaptive Reuse
Liberty Station Naval Training Center
Adaptive reuse of 26 architecturally and historically significant Navy buildings into cultural and community use for nonprofits and retail spaces

Montecito School District Building D (1924)
Modernization and adaptive reuse of various historic concrete schoolhouse structures to provide modern learning environments and community use spaces

Housing Master planning
San Buenaventura Housing Authority-Westview Village
Neighborhood master planning and design of 320-unit affordable housing units and community spaces


PANA - Refugee Immigrant and Cultural Hub


Ventura Springs Veterans Community

Ojai Unified School District Workforce Housing
Ojai, California

Roesling Nakamura Terada Architects

RNT recently partnered with Ojai Unified School District to study a 93-unit teacher / workforce housing project. We ensured the design's density and architecture fit within Ojai's community character, balancing affordability with local charm. Alongside the District and their consultant, we developed a feasibility study, evaluating construction costs and financing solutions, ensuring a thoughtful, viable project. Key project considerations included: circulation to Public Right of Way, utility infrastructure, viability, and community feedback.

Client/Owner

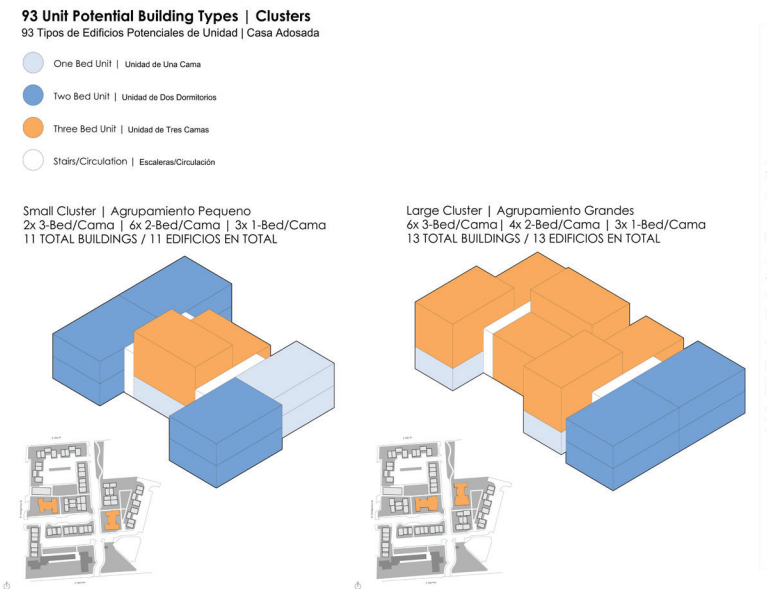
Kevin Olson, Assistant Superintendent
Ojai Unified School District
Email: kevin.olson@ojaiusd.org
Phone: (805) 640-4300 x 1005

Scope of Services: Community Outreach, Architectural Design, Design Development, Site planning









Metropolitan Water District Workforce Housing
San Bernardino County, California

Roesling Nakamura Terada Architects

Metropolitan Water District (MWD) has hired RNT to provide master planning services for their four Pump Station Villages that were originally constructed in the mid 1930's and early 1940's. The original goal was to increase the quality of life for employees living and working in these remote desert environments. The residential villages and associated infrastructure components have come to their end of useful service. RNT was scoped to perform facilities assessment on 74 residential and 12 nonresidential structures. We provided programming / design workshops and priority planning for phased delivery. Master site planning is being performed for all four sites to improve the quality of life levels for the residential employees of MWD. Next steps include development of phased bid packages for the priority plans and components of the master site plans.

Client/Owner

Ish Singh, Project Manager - Campus Capital Projects, Metropolitan Water District
Email: Ishraibati@mwdh2o.com
Phone: 213.217.6000

Size: 88,000 SF

Scope of Services: Facilities Assessment, Programming Master Planning, Modernization, Workshops, New Construction Design







Westview Affordable Housing
Ventura, CA

Roesling Nakamura Terada Architects

RNT worked together with the Housing Authority of the City of San Buenaventura and Bridge Housing as design architects for a 320-unit affordable housing project.

The Housing Authority program includes 50 senior units and 40 market rate units. This project replaced 180 existing units built in the 1950s. Westview is one of the first affordable LEED Neighborhoods in the country. Some of the sustainable elements of the project include: site water use analysis (storm water and greywater); high performance building envelope; connectivity to public and alternative transportation; multi-story buildings with smaller footprints that allow for more open space; and net-zero design.

Scope of Services: Community Outreach, Programming, Design Charettes, Architectural Design, Site planning, Coordination of Proforma, Planning Entitlements

Client/Owner

Jeffrey Lambert, Chief Executive Officer
San Buenaventura Housing Authority
Email: jlambert@hacityventura.org
Phone: 805.901.4229

Size: 3,600SF

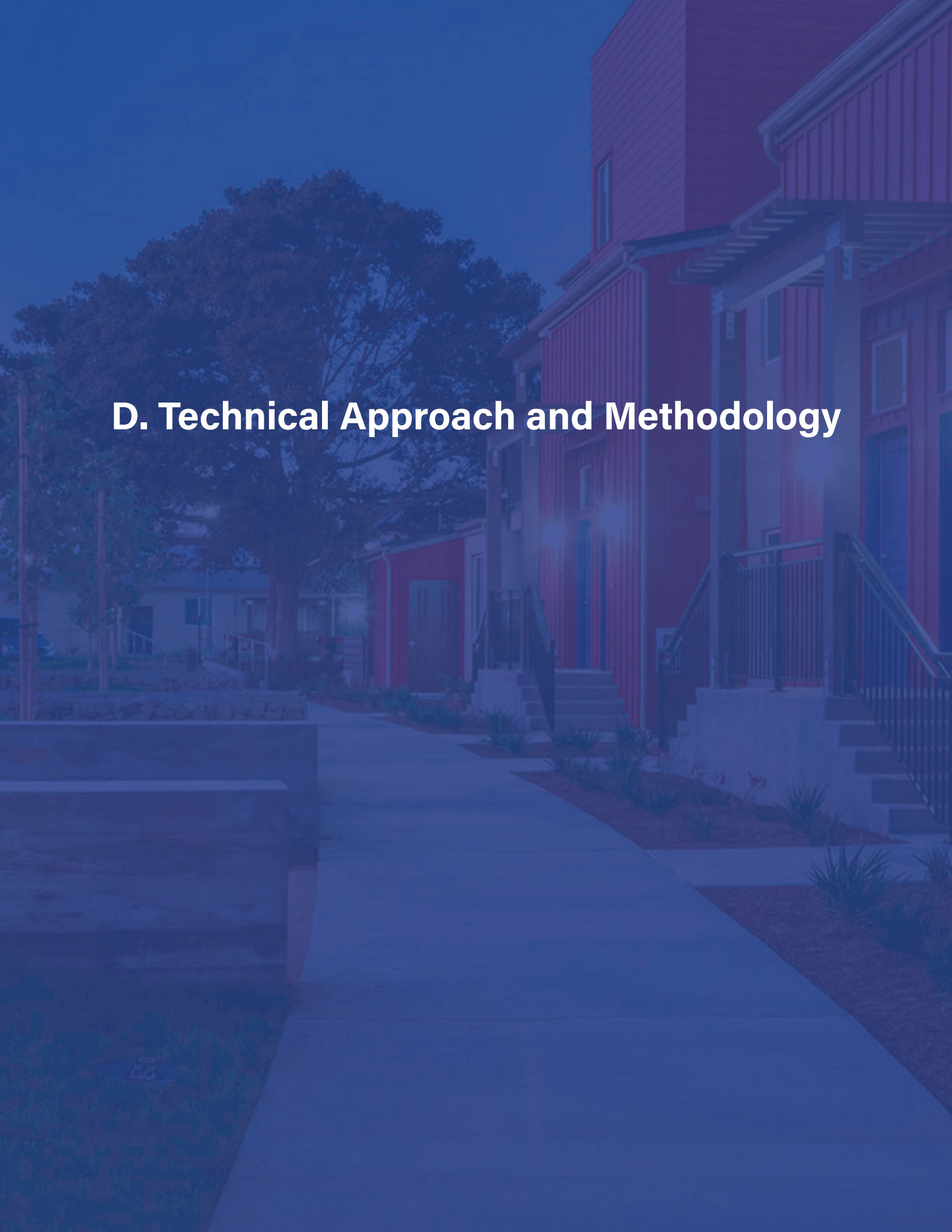
Cost: $34M

Completion: 2016









D. Technical Approach and Methodology

D. Technical Approach and Methodology

Project Understanding

The Oxnard Union High School District ("OUHSD" or the "District") recognizes that housing affordability has become a significant challenge affecting its ability to recruit and retain certificated and classified employees. In response, OUHSD is exploring workforce housing as a strategic opportunity to support employee recruitment and retention, provide below-market housing options, and strengthen its ability to continue delivering high-quality educational outcomes.

Volz Company, in association with RNT (the "Team"), understands that OUHSD has already taken meaningful steps toward advancing employee workforce housing, including participation in the CSBA Education Workforce Housing Cohort, staff housing surveys, and adoption of Resolution 24-21 in Support of Education Workforce Housing in April 2024. We understand that the District seeks to utilize surplus District-owned property to create a cost-conscious workforce housing program that supports recruitment and retention. Survey findings presented to the Board in September 2025 reinforce the need, with a majority of renters indicating interest in workforce housing and many employees experiencing housing cost burden. The recommendations require balancing workforce housing development within an active educational environment while considering operational continuity, financial feasibility, regulatory complexity, and long-term District goals and addressing the unique planning considerations associated with the two potential sites. The Team recognizes the importance of a collaborative, practical approach that balances development feasibility, neighborhood compatibility, and long-term implementation success.

Volz Company and RNT have teamed to provide the District with objective advisory services that will be based on its specific needs, current state, and strategic objectives. We share an ongoing working relationship based on aligned values and transparent fee-for-service arrangements. While our firms have worked extensively on similar engagements, we recognize and pride ourselves on our commitment to immerse into each client's unique mission and culture/environment so that our advice is specifically tailored to empower the most informed decision making.

Technical Approach and Methodology

TASK 1: PROJECT ALIGNMENT AND STRATEGIC PLANNING

District Goals Assessment

- Establishment of Advisory Committee: For the most efficient and timely decision-making, we recommend that an Advisory Committee be identified to guide the project. The Advisory Committee should include key District administrators and decision-makers but also be small enough to meet regularly and make decisions expeditiously.
- Project Initiation Call: With OUHSD's point of contact, we will introduce team members, review the schedule, and discuss logistics for setting up a site tour, stakeholder interviews, and focus group sessions.
- Preliminary Data Gathering: The Team will submit a data request for documentation to be used for analysis.
- Strategic Objectives Alignment Workshop: The Team will facilitate an interactive Strategic Objectives Alignment Workshop to establish a shared vision for workforce housing and align employee residential needs with the District's broader mission and priorities. Key stakeholders will participate in a collaborative discussion to evaluate and prioritize both existing and aspirational mission-based objectives. The strategic objectives developed through this process will serve as a guiding framework for subsequent planning, analysis, and implementation activities.
- Site Tour: The Team will tour the identified sites and visit properties and/or neighborhoods that attract District employees.

Employee Needs Assessment

- Stakeholder Interviews: The Team will conduct both individual and group interviews with key stakeholders. Items to be discussed will include: site location; extent of need for housing; potential size and scale; employee perceptions; development considerations; and market offerings for housing in the area.
- Focus Group Sessions: The Team will conduct focus group sessions with selected employee cohorts to gather qualitative data about an array of constituent preferences. We generally conduct up to four focus group sessions with targeted employee populations.

- Web-Based Employee Survey: In collaboration with OUHSD, the Team will develop and administer an online employee survey to obtain updated information from the 2023 survey for the demand analysis. Factors that are typically considered include: Current living conditions, preferred unit configurations; location desirability, rental rate tolerances, examination of preferred lease term lengths, preferred amenities and any other factors considered critical to OUHSD.
- Rental Market Analysis: The Team will analyze rental housing, focusing on areas and properties nearby that appear to attract OUHSD employees. The analysis will consider the evolving real estate market trends and include planned properties that may serve as direct competitors to any proposed employee housing.
- Employee Housing Demand Analysis: All of the quantitative and qualitative data gathered and analyzed will be utilized in determining demand. Based on the updated research and analytics, the Team will estimate long-term demand by demographic type, rent levels, and unit configuration for the proposed site locations.
- Presentation and Discussion of Findings: The Team will summarize and discuss the findings in the Employee Needs Assessment in presentations to OUHSD. This will include an engaging discussion of a potential program(s) for units and common area uses for employee housing.
- Interim Deliverable: Draft Housing Needs Assessment: The findings from the engagement described above will form the Employee Needs Assessment. OUHSD will have an opportunity for feedback, questions, comments and suggestions. Volz Company will incorporate the agreed upon changes to the interim deliverable.

Regulatory Framework Analysis

- Initial Assessment: The Team will conduct a high-level assessment of applicable state legislation, including AB 2295, AB 1021 and other relevant educational workforce housing provisions, to explore regulatory pathways that may support the District's workforce housing goals. This will include an assessment of the potential implications of SOAR. This task is intended to inform strategic direction and identify areas for further due diligence under Task 2.

Funding Strategy Development

- Initial Assessment: The Team will identify potential funding sources, including bonds, grants, tax credits, and public-private partnership opportunities, and provide sensitivity analyses of alignment with District priorities, desired affordability levels, and fiscal considerations and protection of the General Fund to the greatest extent possible. Based on the August 2025 Board meeting discussion, it is our understanding that Measure E funding is intended to support architectural and design-related activities only and that approximately $4 million may be available for predevelopment efforts, but not for general workforce housing construction. These assumptions will be confirmed and further refined with the District during the course of the study. Financial impacts of different funding and financing options will be further evaluated under Task 2 and Task 3.

Deliverables for Task 1

At the completion of Task 1, the Team will provide the District with:

- Strategic Objectives Alignment Workshop Minutes
- Employee Needs Assessment
- Regulatory Assessment
- Financial Sensitivity Assumptions and Preliminary Outcomes

TASK 2: SITE FEASIBILITY AND DUE DILIGENCE

Property Analysis

- Existing Conditions and Site Review: The Team will conduct a comprehensive review of both District-owned parcels to establish development constraints, opportunities, and overall feasibility. The analysis will include:
  - Review of assessor parcel data, title reports, easements, deed restrictions, and ownership conditions
  - Evaluation of existing site conditions, grading, circulation, drainage, utilities / infrastructure, and adjacent land uses
  - Assessment of current campus operations and identification of operational sensitivities that could be impacted by future development
  - Review of existing planning documents, prior studies, and available mapping information
  - County vs City annexation evaluation

- Environmental and Technical Due Diligence Coordination: The Team will help identify, coordinate, and oversee preliminary environmental and technical due diligence efforts necessary to evaluate site readiness and entitlement complexity. This coordination of District consultants may include:
- Phase I Environmental Site Assessment review or coordination
  - Preliminary biological and agricultural land considerations
  - Floodplain and drainage review
  - Preliminary geotechnical and soils considerations
  - Hazardous materials records review
- Development Capacity and Site Utilization Analysis: Using planning, zoning, operational, and infrastructure data, we will prepare conceptual development capacity scenarios that evaluate:
  - Potential residential unit yields under varying density assumptions (assumes 3 scenarios)
  - Building placement options and campus integration strategies
  - Parking and circulation impacts
  - Relocation opportunities to support facilities if required
  - Buffering and compatibility considerations with adjacent uses
  - Open space, recreation, and community-serving opportunities
  - Emergency access and life safety requirements

  The analysis will include conceptual diagrams and high-level site planning exhibits illustrating development potential and operational impacts. These graphics will be intended to support District decision-making and stakeholder discussions rather than final design.

Infrastructure Assessment

- Utility and Infrastructure Evaluation: The Team including ECG Civil Engineers will evaluate information provided by the District and utility providers regarding the capacity and condition of infrastructure systems serving the project area and identify upgrades necessary to support the housing effort. The assessment will include:
  - County vs City utilities service considerations
  - Water service availability and potential capacity
  - Sewer collection and treatment potential capacity
  - Storm drainage systems and off-site drainage considerations
  - Electrical and telecommunications infrastructure
  - Fire access and emergency response requirements
  - Vehicular circulation and site access conditions
  - Pedestrian and bicycle connectivity
  - Initial coordination with applicable agencies and utility providers will be undertaken, as appropriate, to identify infrastructure constraints and potential improvement requirements.
- Cost Assessment: Based on the proposed development scenarios, our team will prepare preliminary building and infrastructure improvement cost analysis, including:
  - Building unit cost
  - Open and green space
  - On-site utility improvements
  - Off-site utility extensions or upgrades
  - Roadway and circulation improvements
  - Drainage and storm water infrastructure
  - Site preparation and grading considerations
  - Parking replacement and operational improvements

  These costs will be integrated into the broader development feasibility framework and financial modeling effort under subsequent project tasks.

Regulatory Pathway Analysis

- Planning and Zoning Analysis: A central component of Task 2 is identifying the most effective and achievable entitlement path-way for the District. Our team will perform an analysis of:
  - Existing zoning and general plan designations

  - Jurisdictional boundaries and land use authority
  - School district land use authority and applicable education code provisions
  - City of Camarillo planning requirements
  - Ventura County planning and agricultural preservation requirements /SOAR-related constraints
- Entitlement Strategy and Approval Pathway: For each feasible development scenario, we will identify:
  - Approaches to SOAR
  - Required discretionary approvals
  - Potential rezoning annexation or general plan amendment requirements
  - Environmental review obligations
  - Public hearing and stakeholder engagement requirements
  - Estimated approval timelines
  - Key entitlement risks and mitigation strategies
  - Housing-related state legislation AB2295 that may support streamlined approval pathways

  Particular attention will be given to recent state legislation related to workforce housing, public agency housing initiatives, CEQA streamlining opportunities, and emerging regulatory mechanisms that may reduce entitlement risk or shorten approval timelines.

- CEQA Strategy Assessment: Our team will provide support to the District-hired CEQA consultant in the development of the preliminary California Environmental Quality Act (CEQA) assessment to identify likely environmental review requirements associated with each development scenario. This effort could include:
  - Preliminary identification of key areas of environmental concern
  - Assessment of likely CEQA document type requirements
  - Evaluation of opportunities for exemptions or streamlined review
  - Identification of studies likely required during future entitlement phases

  The goal of this analysis is to provide the District with a clear understanding of environmental re-view complexity, timing, and associated risks before advancing into formal entitlement.

Deliverables for Task 2

At the completion of Task 2, our team will provide the District with:

- Existing Conditions and Site Constraints Summary
- Property and Development Capacity Analysis
- Conceptual Site Utilization Diagrams
- Comparative Analysis of Development Scenarios
- General infrastructure Capacity and Improvement Assessment
- Preliminary Cost Opinions
- Regulatory and Entitlement Process Matrix
- CEQA Pathway and Environmental Review Summary
- Strategic Recommendations for Preferred Development Pathways
- Executive Presentation Materials for District Leadership and Board Review

TASK 3: DEVELOPMENT STRATEGY AND FINANCIAL ANALYSIS

Conceptual Design

OUHSD and the Team will review the preliminary site concepts developed in Task 2, including optimal housing placement, density, and integration with existing school operations. The Team will incorporate OUHSD's feedback to refine the concepts and identify preferred approaches for further evaluation and study.

Market Analysis

The findings from the Rental Market Analysis under Task 1 will be utilized to assess current rental market and affordability gaps for OUHSD employees.

Financial Modeling

Building upon the direction established and findings from Task 1 and Task 2, the Team will conduct a comprehensive financial analysis to evaluate the feasibility and implementation of workforce housing development, including:

- Development Pro Forma Analysis: The Team will develop sensitive, interactive pro forma models to test key assumptions and evaluate expected transaction outcomes. The Team will develop up to three scenarios and analyze financial feasibility balancing affordability and District risk. The analysis will test different programmatic iterations, project structures, ownership and financing approaches, and pricing strategies to identify potentially viable options responsive to market conditions, capital expectations, and the District's objectives.
- Feasibility and Delivery Method Evaluation: The pro formas and land value analysis will be used to evaluate employee housing feasibility and compare alternative ownership, delivery, and financing structures. The Team will identify potential funding gaps, allocation of risks, and trade offs associated with each approach to recommend an optimal implementation strategy aligned with District goals.
- Sensitivity Analysis: The Team will evaluate up to three development scenarios aligned with the District's Strategic Objectives, including varying rental rates, cohort groups, and financing structures. The sensitivity analysis will also function similarly to a Value for Money ("VfM") assessment, illustrating the comparative advantages, disadvantages, risks, and financial implications of alternative delivery methods.

Phasing Strategy

As applicable, the Team will develop a high-level phasing strategy to support implementation of workforce housing while maintaining operations of existing school facilities. The analysis will identify key implementation milestones, operational constraints, and considerations to maximize project feasibility, and minimize disruption to campus operations.

Deliverables for Task 3

At the completion of Task 3, the Team will provide the District with Concepts and a Financial Analysis Memorandum.

TASK 4: STRATEGIC RECOMMENDATIONS AND IMPLEMENTATION PLANNING

Optimal Development Strategy

Based on the analyses completed in Tasks 1 through 3, the Team will synthesize findings and provide a clear recommendation/ implementation plan. The plan will consider regulatory feasibility, site utilization, financial viability, employee affordability, operational considerations, and alignment with District priorities and strategic objectives. It will include key milestones to achieve the desired outcomes.

Risk Assessment

The Team will identify potential project risks, constraints, and implementation challenges. This assessment will consider regulatory and entitlement risks, funding and financial risks, construction and phasing considerations, operational impacts to existing school facilities, market conditions, and delivery structure implications. The Team will identify potential mitigation strategies and key decision points.

Community Engagement Strategy

The Team will develop a high-level community engagement strategy. It will identify key stakeholder groups, potential areas of community interest and concern, communication considerations, and approaches to build awareness, transparency, and support for the District's workforce housing goals.

Deliverables for Task 4

At the completion of Task 4, the Team will provide the District with Workforce Housing Development Implementation Plan.

Suggested Timeline

Throughout the engagement, the Team will maintain routine communication with the District, including regular (anticipated weekly) coordination with the District's point of contact to review progress, discuss key findings, and align on priorities. At key milestones, the Team will provide strategic analysis and recommendations, executive briefings, and decision support materials to inform District decision-making and facilitate discussions with the Advisory Committee. The Team will also prepare and deliver professional Board presentations to the District's Board of Trustees summarizing findings, alternatives, and recommendations. The study will culminate in a clear, actionable implementation framework outlining recommended next steps to advance the District's workforce housing goals.

Volz Company will work closely with OUHSD to develop a flexible, phased timeline that aligns with project goals while accommodating evolving needs. Through regular updates, stakeholder collaboration, and strategic adjustments, we will ensure efficient progress, delivering a data-driven, realistic and financially sustainable workforce housing solution.

Task	Deliverable	JUL '26	AUG	SEP	OCT	NOV	DEC	JAN '27	FEB	MAR
Task 1: Project Alignment and Strategic Planning	•Strategic Objectives Alignment Workshop Minutes •Employee Needs Assessment •Regulatory Assessment •Financial Sensitivity Assumptions and Preliminary Outcomes	■	■	■	■					
Task 2: Site Feasibility and Due Diligence	•Existing Conditions and Site Constraints Summary •Property and Development Capacity Analysis •Conceptual Site Utilization Diagrams •Comparative Analysis of Development Scenarios •General infrastructure Capacity and Improvement Assessment •Preliminary Cost Opinions •Regulatory and Entitlement Process Matrix •CEQA Pathway and Environmental Review Summary		■	■	■	■	■			
Task 3: Development Strategy and Financial Analysis	Concepts and a Financial Analysis Memorandum							■	■	
Task 4: Strategic Recommendations and Implementation Pla	Workforce Housing Development Implementation Plan									■

Communication	Description	JUL '26	AUG	SEP	OCT	NOV	DEC	JAN '27	FEB	MAR
Weekly Meeting	Coordination with District Point of Contact	■	■	■	■	■	■	■	■	■
Site Visit	In-Person Meetings, Stakeholder Interviews, Focus Groups, Site Assessment	■		■	■					
Advisory Committee Presentation/Workshop	Key Findings Presentations, Workshop, Milestone Discussion	■			■		■		■	
Board Meeting Presentation	Key Findings Presentations	■				■				■

F. Fee Proposal



F. Fee Proposal

Volz Company, in association with RNT and ECG, will perform the scope of services provided in this document for $231,105 plus reimbursable expenses. Reimbursable expenses up to $19,000 will be billed at cost and only incurred upon the client's prior approval.

Our typical approach to fees is to first engage our client in an honest and open dialog, map the project work plan, identify required tasks, and define project deliverables. Based on this clear understanding of the project, we then match our services to the project scope to come to a mutually agreeable fixed fee. We proudly recognize that our fees are highly competitive, particularly given the broad spectrum of expertise, knowledge of the educator housing market, experience with California school districts, quality work product, and reliable delivery that comes with engagement with Volz Company.

Our fees are most competitive and focused when the following information is provided:

- Record drawings of the existing building for reference or site survey of the proposed site
- Programing information
- Initial project construction budget
- Existing underground utility sizes and locations
- A list of stakeholders (including the various District Staff members and Community Groups)

Note:

- *Volz Company does not provide legal or licensed financial advisory services.*
- *Environmental services and legal counsel are not included in the proposed fees and would need to be contracted directly by OUHSD as separate engagements.*

Fee Schedule With Hourly Rates by Individual and Position

Company	Name	Role	Hourly Rate	Task 1: Project Alignment and Strategic Planning		Task 2: Site Feasibility and Due Diligence		Task 3: Development Strategy and Financial Analysis		Task 4: Strategic Recommendations and Implementation Planning		Fee by Individual
				Hour	Fee	Hour	Fee	Hour	Fee	Hour	Fee	
Volz Company	Ann Volz	Project Executive	$0	20	$-	10	$-	-	$-	20	$-	$-
	Ann Volz	Financial and Transaction Lead	$375	-	$-	-	$-	20	$7,500	-	$-	$7,500
	AJ Yoon	Project Director / Day-to-Day Contact	$320	90	$28,800	20	$6,400	50	$16,000	30	$9,600	$60,800
	Victor Gonzalez	Project Analyst	$150	60	$9,000	-	$-	80	$12,000	5	$750	$21,750
	Sarah Stuiber	Project Coordinator	$90	120	$10,800	10	$900	30	$2,700	20	$1,800	$16,200
RNT	Tyson Cline	Principal	$295	16	$4,720	40	$11,800	26	$7,670	32	$9,440	$33,630
	Catherine Young	Project Architect	$225	8	$1,800	60	$13,500	18	$4,050	-	$-	$19,350
	Carlos Sandoval	Project Manager	$245	18	$4,410	44	$10,780	32	$7,840	21	$5,145	$28,175
	TBD	Draft/ Graphics	$165	-	$-	78	$12,870	-	$-	30	$4,950	$17,820
ECG	Glen Pace	Principal Engineer	$250	-	$-	52	$13,000	-	$-	-	$-	$13,000
	James Fallon	Principal Surveyor	$230	-	$-	24	$5,520	-	$-	-	$-	$5,520
	Tristan Santos	Principal Engineer, Hydrology and Stormwater	$230	-	$-	32	$7,360	-	$-	-	$-	$7,360
GRAND TOTAL				**332**	**$59,530**	**370**	**$82,130**	**256**	**$57,760**	**158**	**$31,685**	**$231,105**

Note: Volz Company works on fixed-fee contracts and our actual hours will most likely be more than shown while staying within the fixed fee provided.

Fees for Project Consultants

Consultant	Fee
Volz Company	$106,250
RNT Architects	$98,975
ECG	$25,880
GRAND TOTAL	**$231,105**

Itemized Total Project Cost Estimate Matching Attachment 1

Task	Fee
Task 1: Project Alignment and Strategic Planning	$59,530
Task 2: Site Feasibility and Due Diligence	$82,130
Task 3: Development Strategy and Financial Analysis	$57,760
Task 4: Strategic Recommendations and Implementation Planning	$31,685
GRAND TOTAL	**$231,105**

Allowance for Reimbursable Expenses

Up to $19,000

Note: Reimbursable expenses may include project-related travel, lodging, meals, mileage, parking, printing and other direct out-of-pocket expenses necessary to support the engagement.



G. Insurance, Legal and Professional Standing

G. Insurance, Legal and Professional Standing

Volz Company will provide the required insurance listed in Exhibit A Services Agreement.

Volz Company and its key personnel have not been involved in any litigation, arbitration or disciplinary actions within the past seven (7) years.



H. References

H. References









Volz Company and RNT

Ventura College
James Zavas, Vice President, Business and Administrative Services (Role: Project Lead)
Project: Affordable Student Housing Development
Email: jzavas@vcccd.edu
Phone: (805) 289-6114

Volz Company

Los Angeles Unified School District
Issam Dahdul, Director of Facilities, Planning & Development, Facilities Services Division (Role: Project Executive)
Project: Los Angeles Unified School District Workforce Housing Initiative
Email: issam.dahdul@lausd.net
Phone: (213) 241-4811

Foothill-De Anza Community College District
Christopher F. Dela Rosa, Vice Chancellor, Business Services, Foothill-De Anza Community College District (Role: Project Lead)
Project: Employee and Student Housing Feasibility Study, Advisory Services for Scholars Row at The Sevens in partnership with Mountain View Whisman School District
Email: delarosachristopher@fhda.edu
Phone: (650) 949-6201

San Bernardino Community College District
Farrah Farzaneh, CCM, Assoc. DBIA, LEED AP BD+C, ENV SP
Executive Director, Facilities Planning, Sustainability & Construction, San Bernardino Community College District (Role: Project Lead)
Project: Legacy Village P3 Mixed-Use Development (Workforce, Affordable and Student Housing)
Email: ffarzaneh@sbccd.edu
Phone: (310) 633-1090

Santa Rosa Junior College
Dr. Pedro Avila
Superintendent / President, Gavilan College
(Former Vice President of Student Services/Assistant Superintendent at Santa Rosa Junior College) (Role: Project Lead)
Project: Santa Rosa Junior College Student/Faculty/Staff Housing Feasibility Study, P3 Advisory Services
Email: pedroavila@gavilan.edu
Phone: (408) 848-4712

H. References – Continued

RNT

Ojai Unified School District
Kevin Olson, Assistant Superintendent, Business, Ojai Unified School District (Role: Project Lead)
Project: Ojai Unified School District Workforce Housing Feasibility Study
Email: kevin.olson@ojaiusd.org
Phone: (805) 640-4300 x 1005

Housing Authority of San Buenaventura
Jeff Lambert, Housing Authority of San Buenaventura (Role: Project Lead)
Project: Westview Village Affordable Housing
Email: jlambert@hacityventura.org
Phone: (805) 901-4229

Ventura Unified School District
Ryan Hughes, Bond Program Manager, Ventura Unified School District (Role: Project Lead)
Project: On-Call Architectural Services, Multiple Engagements
Email: Ryan.Hughes@venturausd.org
Phone: (805) 641-5000











Attachment 1

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 $ 231,105
(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: Ann Volz

Title: President Date: June 4, 2026

Offeror Name: Ann Volz

Offeror Address: 19800 MacArthur Blvd. STE 300, Irvine, CA

Offeror Telephone: 312-909-1340

Offeror Email: avolz@volzcompany.com



Volz Company
19800 MacArthur Blvd. Suite 300
Irvine, CA 92612

VolzCompany.com