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Wisebusinessplans®
When Planning Matters



Oxnard Union High School District

Proposal for Workforce Housing Development Feasibility Study & Advisory Services – RFP #728

Date
May 19, 2026

Services Performed By:
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Services Performed For:
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Executive Summary



Wise Business Plans respectfully submits this proposal to the Oxnard Union High School District ("OUHSD") to provide Workforce Housing Development Feasibility Study & Advisory Services related to the Rancho Campana High School workforce housing initiative.

We understand the District's objective is not simply to evaluate workforce housing feasibility, but to strategically position OUHSD for a sustainable, financially responsible, and operationally practical workforce housing solution that:

- supports employee recruitment and retention,
- improves workforce stability,
- maximizes district-owned land assets,
- preserves educational continuity,
- addresses affordability challenges,
- and aligns with California regulatory and development realities.

This initiative represents a highly strategic public-sector development opportunity requiring:

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- feasibility analysis,
- funding strategy development,
- financial modeling,
- stakeholder coordination,
- implementation planning,
- operational continuity planning,
- and long-term strategic advisory support.

Wise Business Plans proposes a collaborative hybrid advisory engagement designed to provide the District with:

- executive-level strategic guidance,
- advanced financial modeling,
- workforce housing feasibility analysis,
- affordability planning,
- implementation strategy,
- risk mitigation analysis,
- and board-ready decision-support materials.

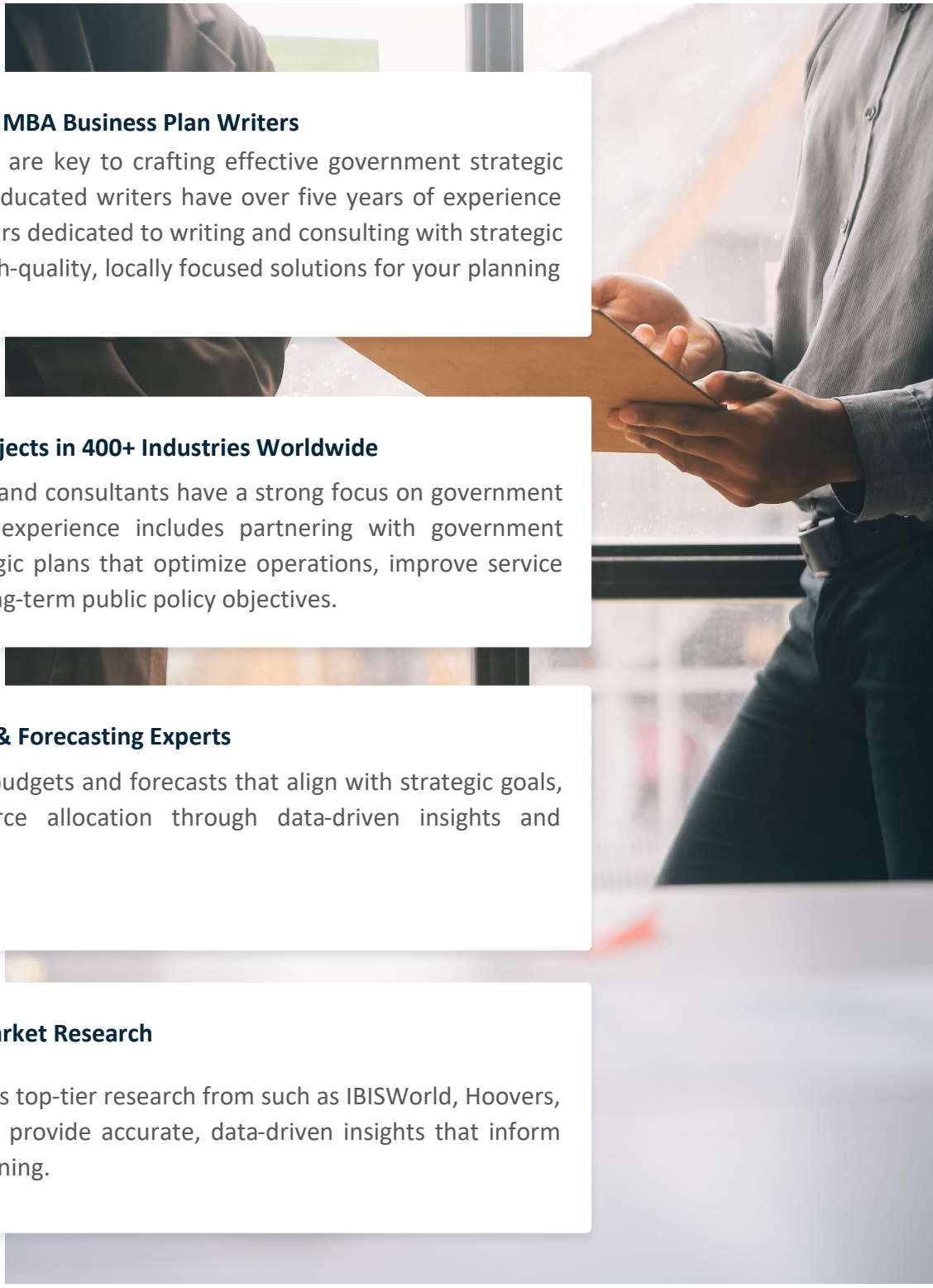
Our engagement structure combines:

- executive Zoom strategy sessions,
- remote analytical services,
- digital collaboration,
- virtual stakeholder coordination,
- and optional onsite advisory services when requested by the District.

This flexible consulting model allows the District to maintain cost efficiency while still benefiting from direct executive-level support and strategic advisory access throughout the engagement.

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Firm Overview



Expert U.S. MBA Business Plan Writers

Education and experience are key to crafting effective government strategic plans at Wise. Our MBA-educated writers have over five years of experience and more than 10,000 hours dedicated to writing and consulting with strategic stakeholders. Ensuring high-quality, locally focused solutions for your planning needs.

15,000+ Projects in 400+ Industries Worldwide

Our business plan writers and consultants have a strong focus on government planning. Our extensive experience includes partnering with government entities to develop strategic plans that optimize operations, improve service delivery, and align with long-term public policy objectives.

Budgeting & Forecasting Experts

We help agencies create budgets and forecasts that align with strategic goals, ensuring efficient resource allocation through data-driven insights and economic trends.

Top-Tier Market Research

Wise Business Plans utilizes top-tier research from such as IBISWorld, Hoovers, Statista, ESRI, and WSJ to provide accurate, data-driven insights that inform government strategic planning.

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Why Wise Business Plans

Wise Business Plans understands the complexities associated with California workforce housing initiatives involving:

- public agencies,
- educational institutions,
- affordability constraints,
- operational continuity,
- stakeholder coordination,
- and evolving regulatory environments.

Our advisory framework incorporates:

- workforce stabilization strategy,
- affordability sensitivity analysis,
- implementation planning,
- funding strategy development,
- operational continuity planning,
- phased development analysis,
- and long-term sustainability modeling.

Wise Business Plans maintains relationships with strategic consultants and advisors capable of supporting:

- workforce housing initiatives,
- development feasibility analysis,
- entitlement coordination support,
- funding strategy planning,
- stakeholder engagement,
- environmental review coordination,
- and implementation strategy development.

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Our role is to help the District evaluate realistic, data-driven pathways forward while maintaining focus on:

- affordability,
- operational continuity,
- fiscal sustainability,
- implementation practicality,

and workforce stabilization.

Understanding of the Project

OUHSD's workforce housing initiative presents a unique opportunity to address one of the most pressing challenges facing California educational institutions today:

workforce recruitment and retention driven by housing affordability pressures.

We understand the project includes:

- an active educational campus,
- adjacent agricultural land considerations,
- SOAR-related development constraints,
- infrastructure and utility considerations,
- regulatory complexity,
- operational continuity requirements,
- stakeholder coordination,
- and long-term affordability planning.

We also recognize the importance of balancing:

- housing density,
- operational functionality,
- financial sustainability,
- educational continuity,
- regulatory realities,
- and long-term implementation feasibility.

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Scope of Services

Task 1	
Strategic Planning & District Alignment	**Wise Business Plans will:** • Conduct executive discovery and stakeholder strategy sessions • Review District workforce housing priorities and affordability objectives • Analyze workforce stabilization and retention considerations • Evaluate implementation pathways and development alternatives • Review relevant California workforce housing legislation **Identify potential funding opportunities including:** • grants, • tax credits, • public-private partnerships, • workforce housing financing mechanisms, • and alternative funding strategies • Develop preliminary strategic implementation frameworks
Task 2	
Feasibility & Due Diligence Coordination	**Services may include:** • Site feasibility review coordination • Development capacity analysis • Infrastructure assessment coordination • Preliminary land-use and entitlement pathway review support • Regulatory and operational risk assessment • Development scenario analysis • Operational continuity planning considerations • High-level phasing strategy support

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Task 3	
Financial Modeling & Development Strategy	**Wise Business Plans will prepare:** • Development budget projections • Construction cost modeling • Financial feasibility analysis • Debt service modeling • Operating pro forma analysis • Rental affordability modeling • Funding stack analysis • Financial sensitivity analysis • Scenario modeling for alternative development approaches • Long-term sustainability forecasting
Task 4	
Strategic Recommendations & Implementation Planning	**Deliverables may include:** • Executive feasibility analysis • Strategic implementation roadmap • Funding readiness recommendations • Affordability strategy analysis • Risk mitigation framework • Community engagement recommendations • Operational continuity recommendations • Board-ready executive presentation materials • Decision-support documentation • Recommended next-step implementation framework

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Risk Mitigation & District Protection

Wise Business Plans understands the importance of protecting the District's operational, financial, and strategic interests throughout the evaluation process.

Our advisory approach incorporates consideration of:

- operational continuity,
- phased implementation planning,
- stakeholder coordination,
- funding variability,
- construction escalation risks,
- affordability sustainability,
- regulatory uncertainty,
- community engagement,
- and implementation feasibility.

Our goal is to provide realistic, data-driven recommendations that reduce uncertainty and support informed decision-making.

Board & Stakeholder Communication Support

Public-sector workforce housing initiatives require transparent communication, executive-level coordination, and strong stakeholder alignment.

Wise Business Plans will support the District through:

- Board-ready presentation materials,
- executive briefings,
- implementation scenario comparisons,
- affordability impact summaries,
- strategic decision-support documentation,
- stakeholder communication support,
- and implementation planning guidance.

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Hybrid Consulting Model

Wise Business Plans proposes a hybrid consulting structure designed to maximize efficiency while minimizing unnecessary project costs.

Included Within Base Fee

- Zoom strategy meetings
- Virtual executive consultations
- Remote feasibility analysis
- Financial modeling
- Digital collaboration
- Board presentation preparation
- Report preparation
- Ongoing virtual coordination

Optional Onsite Advisory Services

Should the District request onsite attendance for:

- board meetings,
- workshops,
- site visits,
- stakeholder meetings,
- strategic planning sessions,
- or implementation coordination,

onsite consulting services may be provided at an additional cost based upon:

- approved per diem consulting rates,
- travel expenses,
- lodging,
- and onsite consulting time.

This structure provides the District flexibility while maintaining cost efficiency and executive accessibility.

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Workforce Housing Strategy, Feasibility & Employee Retention Support

Wise Business Plans recognizes the growing importance of workforce housing initiatives in supporting employee recruitment, workforce retention, operational stability, educational continuity, and long-term community sustainability within public-sector organizations and school districts.

Our consulting approach is designed to support workforce housing initiatives through:

- workforce housing feasibility analysis,
- strategic redevelopment support,
- financial modeling,
- funding strategy support,
- public-private partnership coordination,
- stakeholder engagement,
- implementation planning,
- and long-term operational sustainability analysis.

Services may include:

- workforce housing demand assessments,
- employee housing needs analysis,
- redevelopment and site opportunity analysis,
- implementation sequencing,
- project funding readiness support,
- financial sustainability modeling,
- partnership coordination support,
- and executive-level strategic reporting.

Wise Business Plans understands the importance of aligning workforce housing initiatives with:

- employee recruitment and retention goals,
- long-term financial sustainability,
- operational practicality,
- community impact,
- implementation feasibility,
- and scalable development strategies.

Our consulting approach emphasizes:

- implementation-focused planning,

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- stakeholder collaboration,
- data-informed analysis,
- financial responsibility,
- operational sustainability,
- and practical long-term workforce housing recommendations aligned with District priorities.

Wise Business Plans also recognizes the increasing importance of integrated planning, demographic analysis, and GIS-supported visualization tools in workforce housing strategy development.

Through coordination with technologies such as Esri ArcGIS, consulting support may include:

- demographic and workforce mapping analysis,
- housing accessibility analysis,
- redevelopment opportunity visualization,
- employee commute and workforce concentration analysis,
- and dashboard-ready reporting supporting executive-level decision-making and long-term housing strategy planning.

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Deliverables

Deliverables may include:

- Workforce housing feasibility analysis
- Financial modeling package
- Funding strategy recommendations
- Affordability analysis
- Strategic implementation roadmap
- Risk mitigation framework
- Operational continuity considerations
- Executive summary reports
- Board-ready presentation materials
- Decision-support documentation



Proposed Timeline

Phase	Estimated Timeline
Discovery & Strategic Alignment	2–3 Weeks
Feasibility & Financial Analysis	4–6 Weeks
Draft Recommendations & Review	2 Weeks
Final Deliverables & Presentations	1–2 Weeks

Estimated Total Engagement:

Approximately 9–13 Weeks

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References

Name	Request	Result	Contact
United States Air Force (USAF)			
	Request: Analysis and proposal of digitizing records.	Result: Digital medical records initiated	Contact: Ms. Misty Nash, misty.nash@us.af.mil
Florida Parks and Recreation			
BG RIDA STATE PA	Request: Budgeting and management of fees.	Result: New property management company	Contact: Mr. Dane White, Dwhite@bgfloridaparks.com
USCIS (Immigration - 1K+ projects)			
U.S. Citizenship and Immigration Services	Request: Immigration application support	Result: Immigration approved	Contact: Atty. Rachel Winkler, rwinkler@nixonpeabody.com
Space Railway Corporation			
SPACE RAILWAY	Request: Strategic Planning for space railroad	Result: Secured funding for the project	Contact: Mr. Donald McGregor https://www.spacerailway.com
Careville Housing Solutions			
CAREVILLE	Request: Strategic Planning for affordable housing	Result: Funding for affordable housing.	Contact: Mr. Oscar Lewis https://carevillehomes.org/
Private Sector (10K+ projects)			
	Requests: Goals, directions, market research and financial modeling.	Results: New jobs, funding, industries	Additional references available upon request

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About the Wise Team



Director Bio:

Joseph Ferriolo is a highly experienced professional with an extensive strategic planning and analysis background, particularly in the context of government entities. As the Director of Wise Business Plans for the past fifteen years, he has led the development of over 15,000 strategic business plans, serving a diverse range of clients, including small and medium-sized businesses (SMBs), mid-market organizations, and government municipalities. Joseph's expertise is centered around budgeting, forecasting, and financial analysis, where he excels at transforming complex financial data into actionable insights that drive informed decision-making. His strategic approach helps government agencies and organizations align their long-term goals with precise, data-driven financial strategies, ensuring fiscal responsibility and effective resource allocation. Holding a Bachelor of Science in Management Information Systems (MIS) from the University of Nevada, Las Vegas, Joseph brings a combination of technical proficiency and strategic insight to every project. His work enables government entities to streamline operations, optimize budgets, and achieve sustainable, long-term success through well-structured, actionable plans.

Economist Bio: Jeff D.

Jeff D. is a seasoned Economist and Senior Business Plan Consultant at Wise Business Plans, bringing over ten years of experience in strategic planning and analysis, particularly for government entities. Holding an MBA from the esteemed Ross School of Business at the University of Michigan and an undergraduate degree in Mechanical Engineering, Jeff combines a strong analytical foundation with a technical approach to problem-solving. Throughout his career, Jeff has specialized in complex financial modeling and strategic analysis across various industries, including military, IT/digital services, healthcare, hospitality, and real estate development. His expertise in government operations and private sector practices enables him to develop actionable strategies aligning with fiscal responsibility and operational efficiency. Known for his collaborative consulting style, Jeff works closely with clients to navigate the intricacies of strategic planning, ensuring that each plan is data-driven but also practical

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and impactful. His work with government agencies has helped shape policies, optimize resource allocation, and achieve long-term sustainability through well-crafted business strategies.

Senior Consultant Bio: John D.

John D. is a Senior Business Plan Consultant at Wise Business Plans with over ten years of experience, specializing in government strategic planning and analysis. Throughout his career, he has developed more than 900 business plans across over 300 industries, including significant work with government entities and public sector organizations. His expertise spans business planning and management consulting, with a proven track record of helping clients improve operational efficiency and leadership across various U.S., U.K., E.U., Canadian, and Australian sectors. John holds an A.A. in Business Administration, a BBA in Marketing, and an MBA in Finance and Accounting, providing him with a well-rounded skill set for addressing complex challenges in the private and public sectors. His experience advising C-suite executives—CEOs, CFOs, and other leaders—has focused on streamlining accounting, marketing, human resources, and management processes. He specializes in new market entry, creating comprehensive marketing plans, and building effective performance metrics that help organizations measure success. In government strategic planning, John excels in financial forecasting and business modeling, working with key stakeholders to craft data-driven strategies that optimize resource allocation, improve service delivery, and drive long-term growth.

Senior Consultant Bio: Eric N.

Eric N. is an experienced strategic planning expert who leverages an MBA from Carnegie Mellon University's Tepper School of Business and a B.A. from UCLA to bring a high level of expertise to government strategic planning. His business plan writing experience spans various industries and business maturity levels, from high-profile multi-million-dollar technology investment initiatives in the Fortune 500 sector to seed funding for local startups and community projects. Eric's journey in business planning began while serving in the Peace Corps in West Africa, where he launched and managed several initiatives requiring funding from large institutional sources such as USAID, the World Bank, and the World Health Organization. This experience has given him a unique perspective on navigating the complexities of securing government and institutional funding, making him highly skilled at aligning strategic plans with the priorities and requirements of government stakeholders. With a proven track record of creating effective, results-driven strategies for private and public sector clients, Eric is adept at using data and insights to guide organizations in achieving their goals. His ability to develop comprehensive plans that secure critical funding and resources has made him a trusted advisor in government strategic planning.

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Senior Consultant Bio: Eric M.

Eric M. is a Senior Business Plan Consultant at Wise Business Plans with over ten years of experience in government strategic planning and analysis. During his career, he has crafted more than 800 business plans across over 100 industries, showcasing his expertise in helping clients navigate the intricacies of business strategy, particularly within the public Sector. Eric earned his MBA from Western Illinois University, where he also studied Political Science, ultimately deciding to focus on international business. His diverse background has allowed him to approach government strategic planning with a unique perspective integrating political insight and business acumen. Eric's experience spans clients from various sectors and experience levels, from those just starting their business journey to seasoned entrepreneurs who have taken their companies public. Eric excels in guiding government entities through the business planning process, offering clear, actionable strategies regardless of the client's prior experience. His ability to distill complex strategic concepts into practical, effective solutions makes him an invaluable asset to government organizations seeking to enhance operational efficiency, align with public policy, and achieve sustainable growth. With his comprehensive knowledge of both business and governmental operations, Eric is a trusted advisor for developing well-informed, data-driven strategic plans that serve the needs of both local and global communities.

Graphic Design Team



Our team graphically designs the final strategic business plan to provide a polished look.

Account Executive



A dedicated point of contact for your team to get immediate updates and status progress.

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Fee Proposal

Proposed Not-To-Exceed Fee: **$148,500**

This includes:

strategic advisory services,	**feasibility analysis,**	**financial modeling,**	**implementation planning,**	**executive consultations,**	**virtual collaboration,**	**and deliverable preparation.**

Optional Onsite Advisory Fees

Service	Rate
Senior Consultant Per Diem	$2,500/day
Travel Expenses	Actual Cost
Lodging & Meals	Actual Cost

All onsite consulting services would require prior District approval.

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Closing

Wise Business Plans appreciates the opportunity to submit this proposal to the Oxnard Union High School District.

We believe this initiative represents an important opportunity to strengthen workforce stability, educational continuity, and long-term community sustainability through thoughtful strategic planning and feasibility analysis.

Our team looks forward to the opportunity to partner with OUHSD and provide objective, implementation-focused guidance designed to support informed decision-making and long-term implementation success.

Thank you for your consideration.

Warm regards,

Joseph Ferriolo/ Strategic Planning Director

joe@wisebusinessplans.com (800) 496-1056 x 208

DocuSigned by:
Joseph Ferriolo
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5/19/2026