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## **Request for Proposal (RFP) for Feasibility Study Services**

**Date Issued:** 1/6/2025

**Submission Deadline:** 1/31/2025

**Contact Person:** Kevin Olson, Assistant Superintendent. [Kevin.Olson@OjaiUSD.org](mailto:Kevin.Olson@OjaiUSD.org)

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### **1. INTRODUCTION**

The Ojai Unified School District is issuing this Request for Proposal (RFP) to seek qualified consulting firms to provide a feasibility study for a workforce housing development located at 414 E. Ojai Ave (“Project”). This Project aims to build affordable housing for our staff (certificated and classified) in accordance with the provisions of Assembly Bill 2295, Government Code section 65914.7, and the Teacher Housing Act of 2016, California Health (which amended Health and Safety Code section 53570, et seq.) Please see attached “Memorandum” dated August 31, 2023, which sets forth the requirements contained within AB2295 and associated Government Code section 65914.7. The district will engage an architectural firm to develop up to three conceptual designs, meeting goals outlined by our Board of Trustees (Please see the Board’s previously adopted “Exhibit A”, attached herewith). The firm would participate in development of up to three conceptual designs which will help us understand the feasibility of small, medium and large projects. A single project will be identified as being “most feasible” and as meeting most of the OUSD Board’s goals, and will be further developed by the feasibility firm. The property is approximately 8 acres, and contains some buildings previously designated by the City of Ojai as being historically significant. Concepts should include how those buildings might be renovated to be used as residential or commercial purposes, either in conjunction with the development of the workforce housing project or separately therefrom. The district will obtain site surveys, soil samples, and other reports as needed to aid in the design process.

### **2. PROJECT REVIEW**

Provide a high-level overview of the Project:

- **Location:** 414 E. Ojai Ave. Ojai, CA 93023
- **Scope of Work:** Project Feasibility Services
- **Project Size:** Between 40 to 150 units on an approximately 8 acre property.
- **Timeline:** This scope of work will, hopefully, be completed prior to the end of May

### **3. SCOPE OF SERVICES**

#### **TASK 1: CONSULTANT RESEARCH PHASE**

##### Task 1.1: Affordable Housing Consultant Research and Analysis

Consultant shall evaluate the site for meeting the state REAP 2.0 definition for infill including but not limited to: land use; location within TCAC Opportunity Maps; highest and best use for housing and/or mixed-use projects; barriers/challenges; market need; calculation of reductions in VMT; infrastructure needs; innovative construction techniques; and potential financing strategies/funding sources.

Consultant shall provide a draft and final report with an executive summary, with the goal of providing a comprehensive and clear understanding of opportunities, barriers, and next steps to utilize the property for housing/mixed use. Consultant shall incorporate feedback from staff review of the draft report into the final version.

##### Task 1.1 Deliverables:

1.1.1 Draft report

1.1.2 Final report with executive summary

##### Task 1.2: Evaluate Site Development Requirements

Consultant shall work with site owners to research and provide recommendations related to the identified site, including but not limited to environmental mitigation and liability;; evaluation of use for former RDA site(s); and considerations of shared building and lot splits. Consultant shall work with owners to develop a “Project Goals” list for future evaluation of the success of the project.

##### Task 1.2 Deliverables:

1.2.1 Draft Report on development requirements

1.2.2 Final Legal analysis and recommendations report with executive summary

#### **TASK 1 SUMMARY OF DELIVERABLES**

Task 1.1	1.1.1 Draft Report 1.1.2 Final report with executive summary
Task 1.2	1.2.1 Draft Legal analysis

	1.2.2 Final Legal analysis and recommendations report with executive summary
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**TASK 2: EXISTING SITE CONDITIONS/ ENVIRONMENTAL STUDIES**

Task 2.1: Environmental Study

Consultant shall provide, as appropriate: Phase I/II Env. Site Assessments, Vapor Encroachment Screenings, historical/cultural resources evaluations, endangered species/habitat assessments, brownfield/soils, etc. for identified sites.

Consultant shall provide project specific Environmental Studies to inform decision making and identify environmental concerns and mitigation measures.

Task 2.1 Deliverables:

2.1.1 Environmental Study

**TASK 2 SUMMARY OF DELIVERABLES**

Task 2.1	2.1.1 Environmental Study
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**TASK 3: ANALYSIS AND RECOMMENDATIONS**

Task 3.1: Financial Model and Sensitivity Analysis

Consultant review up to three construction models meeting the state REAP 2.0 definition for infill and analyze their financial feasibility, based on income, debt, and expense projections. Consultant shall do a sensitivity analysis with projections on rental rates, and parentage of renters in various qualifying groups from AB2295. Consultant will discuss how projects align to the “project goals” defined in task 1. Consultant will review projects adherence of affordable/workforce including but not limited to: low-income affordable rental housing (at or below 80% AMI), workforce housing above 80% AMI, for-sale affordable housing.

Consultant shall make recommendations for the most suitable models for future development. Consultant, alongside District may be asked to present Project findings and recommendations to deliberative bodies of nearby cities/jurisdictions.

Task 3.1 Deliverables:

3.1.1 Draft recommendations report

3.1.2 Final recommendations report

Task 3.2: “A Path Forward” report

Consultant shall provide a report with the suggested “best project” reviewing financial feasibility, environmental impacts, permitting challenges including the AB2295 guidelines, and adherence to project goals. The report shall include a review of the project risk management moving forward into financing and construction.

Task 3.2 Deliverables:

3.2.1 “A Path Forward” report

**TASK 3 SUMMARY OF DELIVERABLES**

Task 3.1	3.1.1 Draft recommendations report 3.1.2 Final recommendations report
Task 3.2	3.2.1 Draft “A Path Forward” report 3.2.2 Final “A Path Forward” report 3.2.3 PowerPoint slide deck with associated materials

**TASK 4: Request for Qualifications**

Task 4.1: Development of Site-Specific Solicitations for Affordable Housing Developer (RFQ)

Upon identification of suitable project and approval by the OUSD Board of Trustees, Consultant shall develop site specific solicitation (RFQ) for affordable housing development partner(s).

Consultant shall provide fully developed site-specific solicitations (for example, Requests for Qualifications), incorporating research completed during all previous tasks and proposed scoring/evaluation factors. Information presented in the solicitation should present a clear picture of the District’s vision and all of the necessary information for a responder to the RFQ to make an informed decision and proposal. The solicitation should position the District to be ready to release the document and select partners.

Task 4.1 Deliverables:

4.1.1 Draft Request for Qualifications

4.1.2 Final project-specific RFQ

Task 4.2: RFQ Response Review

Consultant will assist in review of response and arranging potential interviews with Developers. Review will include recommendations on the appropriate timing to bring on a developer, including whether or not the district should finance the Project internally or partner with a developer for financing.

Task 4.2 Deliverables:

4.2.1 Scoring of RFQ Responses

4.2.2 Report outlining partnership recommendations

**TASK 4 SUMMARY OF DELIVERABLES**

Task 4.1	4.1.1 Draft solicitations 4.1.2 Final site-specific solicitations
Task 4.2	4.2.1 Scoring of RFQ responses 4.2.2 Report outlining partnership recommendation

**4. PROPOSAL REQUIRMENTS**

- Cover Letter: Brief introduction of the firm, statement of interest, and summary of relevant experience.

- Firm Profile: Overview of the firm, including size, experience, and specialties.
- Project Team: List key team members who will be assigned to this project, with their relevant experience and qualifications.
- Relevant Experience: Descriptions of similar projects completed by the firm within the past five years.
- Approach and Methodology: Outline the proposed approach to this project, including any unique methodologies or design philosophies.
- Timeline: Proposed timeline to complete each project phase.
- Fee Proposal: Detailed fee proposal, including a breakdown by project phase and any additional costs (reimbursable expenses, hourly rates for specific services, etc.).
- References: Contact information for at least three client references for similar projects.

## 5. EVALUATION CRITERIA

- Relevant Experience and Qualifications (20%)
- Proposed Approach and Methodology (30%)
- Project Team (20%)
- Fee Structure and Cost (20%)
- References (10%)

## 6. SUBMISSION DETAILS

Specify the instructions for submitting proposals:

- **Submission Deadline:** January 31st, 2025
- **Format:** Digital
- **Delivery Method:** Email: Kevin.Olson@OjaiUSD.org
- **Questions:** E-mail: Kevin.Olson@OjaiUSD.org