



# Key Site 17

Open Session

# Objectives

- Provide Key Site 17 Project history
- The Request for Proposal (RFP) Process
- Next Steps

# Maintaining The Focus!!!

- “The **highest and best use** of the land has been determined to be **senior housing**. There will still be some **capacity for creativity for developers**, however, the district’s intent has been **to generate a long term revenue stream from the highest and best use of the property.**” (May 18, 2007 correspondence to Board of Trustees from Staff)
- It was recommended, during the 7-11 committee process that the District obtain the entitlements to increase the value of the lease potential. One reason is that the community will recognize that we are doing this because we are trying to do **what is best for the children of Orcutt!** (October 19, 2007 correspondence to Board of Trustees from staff)
- The School District’s project will attempt to better define the planning framework for the potential future development of a senior housing facility. **Senior housing facilities are typically defined by a range or level of care required by its residents.** (March 7, 2008 correspondence to Board of Trustees from Staff)

# Commitment to Students and Community

- As you can see, it always was, is and will be all about the students in the Orcutt Union School District !
- Providing quality facilities is an important and ongoing challenge for our District and community.
- The primary focus of the Key Site 17 Project is to provide an ongoing revenue stream dedicated to this cause while addressing a community need for senior housing.
- In Orcutt, the School District is an integral part of the “social fabric” of the community!



# The History Demonstrates the Investment

## Chronology of Key Site #17

- 2000 Received 1<sup>st</sup> land appraisal of \$1.8 million
- 2001 Purchased property at \$1.3 million
- 2007 Determination made to use property for senior housing, received 2<sup>nd</sup> land appraisal of \$6.3 million, and rezoning process begins with assistance from OASIS Associates, INC., C.M. Florence, AICP land use consultant
- 2010 Initiation of the Subsequent Environmental Impact Report
- 2013 SB County Planning Commission recommends approval of the rezone
- 2014 SB County Board of Supervisors approves the rezone. Received 3<sup>rd</sup> land appraisal of \$6.685 million; action is taken by the Board to move forward
- 2015–18 Project on hold

# The History Demonstrates the Investment

## Chronology of Key Site #17 (cont.)

- Sept. 2018 Waiver of Provisions applied for and approved
- March 2019 RFQ's (Request for Qualifications) submitted to the District – 5 submittals
- April 2019 RFP's (Request for Proposals) issued to 3 finalists
- July 2019 Received fourth land appraisal of \$6.0 million
- Aug./Sept. 2019 RFP's evaluated, references checked and interviews held
- Sept. 2019 School Board Study Session



# Formula for Success

**Quality Input + Quality Process  
= Quality Outcome**



# Quality Input

Team of Experts

RFP Components

# Committee Members

## **Carol M. Florence – AICP**

Carol is Principal Planner for OASIS Associates, INC. right here in San Luis Obispo. She is a private consultant and has been involved with Key Site 17 since 2007. Carol is our “Project Concept” Expert.

## **Nancy Taylor, Esq.**

Nancy is a partner with Orbach Huff Suarez & Henderson LLP in Pleasanton, CA. She represents public entities and school districts in the areas of real property, business and construction. She has been involved with Key Site 17 since 2018 and is our “Lease Agreement” Expert.

## **Andrew Plescia – A. Plescia & Co.**

Andy provides services related to structuring of agreements for specific development activities involving various forms of public and private financing arrangements. Andy has been involved with Key Site 17 since 2018 and is our “Finance Plan” Expert.

## Committee Members (cont.)

- Julie Payne is the Administrative Assistant to the Assistant Superintendent of Business Services in OUSD. Julie has been involved with Key Site 17 since 2017 and maintains the continuity throughout the project.
- Bob Klempen is the Interim Assistant Superintendent of Business Services and is currently finishing his responsibilities by facilitating the evaluation of firms through the RFP process to final School Board approval.
- Bill Young is the Assistant Superintendent of Business Services and will move this project towards completion.

## Board Liaison

- Lisa Morinini is President of the Orcutt Union School District Board of Education and a first grade teacher in Santa Maria Bonita School District. She brings a real estate background and perspective to the committee work

# RFP Components

- Project Concept
- Project Schedule
- Financial Plan
- Lease Parameters/Requirements



# Quality Process

- Clarifying Questions
- Inquiring of Past Performance
- Evaluating Objectively
- Confirming through Interviews



# Formula for Success

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# Next Steps

- October Board Resolution Awarding the Lease and Development of Key Site 17
- Lease Negotiations
- Press Releases
- Entitlement Phase
- Construction
- Initial Estimated Occupancy 2021-2023



**Questions?**