Hancock Park & DeLong INC.
SCHOOL FACILITY CONSULTING

SCHOOL FACILITIES GRANT AND CONSULTING SERVICES PROPOSAL

for the

BISHOP UNIFIED SCHOOL DISTRICT

SEPTEMBER 2019

925 L St, Suite 1200
Sacramento, CA 95814

Phone: 916.662.7210

www.hpdschools.com

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BACKGROUND & EXPERIENCE

Hancock Park & DeLong, Inc. (HP&D) is a small, boutique firm focused solely on helping California school districts and other clients engaged in school facilities understand and access state, federal, and other funding programs. We have no other services or commitments—-largely because we believe it is critical for the benefit and fiduciary responsibility of public school districts to keep the services of construction management, architectural design, and/or other financial decisions independent from state eligibility and funding assistance to ensure there aren't any conflict of interest issues. The sole principal of HP&D (Mr. Hancock and Ms. Park have retired) and our two Associates bring a combined 35 years of service in both the public and private-sector in the school facility funding arena. And because HP&D is a small firm, clients will be working directly with the principal or associates of the firm.

Our record of success on behalf of our clients is clear as we have garnered approval for over $1.1 billion in school facility grant funding and avoided the return of millions of state grant funding through successful negotiations with the Office of Public School Construction and formal appeals to the State Allocation Board:

- Over $650 million in New Construction, Modernization and Seismic Mitigation Program Funding
- Over $380 million of the total of $800 million available statewide for the Emergency Repair Program
- Over $50 million in Charter School Facilities Program grants
- $57 million in Overcrowding Relief Grants
- $15 million respectively in Joint-Use and Career Technical Education Facility Program Grants

HP&D has successfully assisted clients across the state in maximizing school facility funding working not only as private consultants, but also through demonstrated and lengthy public sector employment. In a nutshell, with decades of experience as civil servants working for the Office of Public School Construction and State Allocation Board , the Principals at HP&D were all significantly involved at the executive, policy and regulatory level in creating and administering the current state facility funding programs. Members of our firm literally wrote and / or directed the writing of the majority of the regulations in effect today. We also have been directly responsible and instrumental in assisting districts in obtaining billions of dollars in school facility funding in the last 30 years as public sector employees. This background is unmatched. Our experience in the public sector gives us unique insight into the rules and regulations that drive a district's financing opportunities, thereby maximizing them to their fullest.

Our firm has been in business since 2005 and has had no litigation nor has litigation been threatened.

PROJECT TEAM



Christopher L. DeLong, Principal, brings over 22 years of school facility program experience with eleven years of public sector experience at the Office of Public School Construction (OPSC) where he served in various capacities as he rose to management levels. Beginning his career with OPSC as a Project Manager, he soon was promoted to Project Management Supervisor for the Los Angeles, Riverside, Orange, San Bernardino, and San Diego counties where he was instrumental in assisting the districts with maximizing eligibility and garnering funds for the construction and modernization of school facilities.

Mr. DeLong's extensive knowledge of the state school building programs and ability to problem solve to the benefit of his school district clients earned him a position on the OPSC Senior Management Team as the Policy Manager. This important and influential position involved the management and development of official OPSC / State Allocation Board (SAB) positions on all proposed legislation that affected the various school facility programs administered by the SAB. In this capacity, he also provided technical expertise to legislative committee staff on the state school facility funding programs.

Mr. DeLong became known to the wider school construction community through his extensive participation on the SAB Implementation Committee where he directed and participated in the development and presentation of significant state policies and regulations on many diverse facilities programs such as the Overcrowding Relief Grants, Charter School Facilities, Career Technical Education Facilities, Seismic Mitigation, Emergency Repair, and Federal Renovation Programs.

In addition, Mr. DeLong was responsible for orchestrating the development of appeals and the crafting of special reports on public policy issues that were presented to the SAB.

Since his tenure at Hancock Park & DeLong, Inc., Mr. DeLong has garnered approval for over $600 million in various School Facility Program funds and over $350 million in Emergency Repair Program approvals for our clients working closely with the California Department of Education, Department of Toxic Substances Control, Division of the State Architect, OPSC/SAB, and other state agencies.

Mr. DeLong earned a Bachelor's of Science degree in Environmental Design with an emphasis in architecture from the University of California, Davis. During his studies and after graduation, he worked in the design field for UC Davis before joining the government sector.

PROJECT TEAM



Jessica Love, Associate, has 10 years of experience working as both a project manager and program analyst at the Office of Public School Construction (OPSC) where she regularly worked with client school districts to establish, adjust, and review eligibility and requests for funding in the various School Facility Programs. In addition, Ms. Love most recently worked with the Policy and Specials Team of the OPSC where she reviewed and processed facility hardship and appeal requests to the State Allocation Board.

Ms. Love also has an extensive background in the implementation of legislation and administrative regulations as she assisted in the development of the Critically Overcrowded Schools Program that was created as a result of the passage of Proposition 47 in 2002.

Ms. Love holds a Bachelor's of Science degree in Managerial Economics from the University of California at Davis.



Kelly Long, Associate, has 17 years of public service with the State of California and has experience in a broad range of grant programs, regulatory issues, and procurement. Most notably, Kelly has over five years of experience working at the OPSC where, as a School Facility Program Analyst, Kelly assisted large and small school districts across the State with eligibility determinations and funding requests for modernization and new construction. Kelly was a key participant in the development and administration of the Career Technical Education Facilities Program and routinely presented proposals to the State Allocation Board Implementation Committee. Kelly also approved requests for site acquisition, analyzed legislation, reviewed facility hardship applications, and drafted appeals to the State Allocation Board.

Mr. Long holds a Bachelor's of Science degree in Anthropology and a minor in Geography from the University of Utah.

Hancock Park & DeLong, Inc.
SCHOOL FACILITY CONSULTING

SERVICES

Hancock Park & DeLong, Inc. (Consultant) can provide the following consulting services:

OFFICE OF PUBLIC SCHOOL CONSTRUCTION (OPSC) SERVICES / PROCESSES

A. NEW CONSTRUCTION ELIGIBILITY

Establish or Update New Construction Eligibility Baseline:

- Review District-provided enrollment and site data.
- Review District-provided or research dwelling unit (housing development) information, if necessary and applicable.
- Analyze / calculate eligibility under a Districtwide basis, or High School Attendance Area Basis if it is believed that it would be more advantageous to file under this method.
- Provide 5 year and 10 year projections as permitted under and pursuant to the regulations of the State Allocation Board.
- Include analysis / review of alternative projection methods including use of approved tentative and final maps in the District's boundaries and birth rates as permitted under the regulations of the State Allocation Board.
- Prepare eligibility application(s) and supporting documentation for filing with the Office of Public School Construction (OPSC).

B. MODERNIZATION ELIGIBILITY

Establish and/or Update Modernization Eligibility Baselines

- Gather baseline eligibility data submitted to the OPSC in prior years.
- Review District-provided school construction data such as DSA A#s, square footages, and room use information.
- Review and update site specific eligibility for all school sites where eligibility is found.
- Estimate state grant eligibility.

C. APPLICATIONS FOR STATE FUNDING

Prepare applications for state grant funding:

- Confer with District to identify facility needs, develop strategies for meeting the needs, and identify state funding sources where available.
- Coordinate with architect of record and/or cost estimating consultant for their preparation and completion of site development worksheet for new schools as required by OPSC or the access compliance and fire/life safety checklist for modernization projects.
- Complete application(s) for state grants for each project.
- Coordinate with and respond to OPSC if any issues or questions arise during the review of an application.

OFFICE OF PUBLIC SCHOOL CONSTRUCTION (OPSC) SERVICES / PROCESSES (cont.)

D. APPLICATIONS FOR FACILITY HARDSHIP FUNDING

Prepare applications for state grant funding:

- Confer with District to identify facilities with imminent health and/or safety needs.
- Coordinate and consult with District to ensure proper professional reports/assessments and governmental concurrences are completed to document and report the mitigation required on the health and/or safety issues.
- Coordinate with architect of record and/or cost estimating consultant for their preparation and completion of cost estimates, as required., to ensure mitigation costs are delineated to meet the requirements of the state.
- Prepare and complete a request for California Department of Education (CDE) plan approval for the Projects.
- Coordinate with and respond to CDE if any issues or questions arise.
- Prepare request for facility hardship funding including the cost benefit analysis, state forms, and application for funding.
- Meet with OPSC staff, if necessary, to justify the request and costs with the assistance of the Client, architect / engineer, and/or cost estimator, as needed.
- Coordinate with and respond to OPSC if any issues or questions arise during the review of an application.

E. APPLICATION FOR FINANCIAL HARDSHIP ASSISTANCE

Prepare requests for financial assistance for state match required

- Coordinate with District to compile financial statements as required.
- Coordinate submittal of application package and assist with questions raised by OPSC.

F. ACCOUNTABILITY

Prepare requests for release of grants

- Prepare requests to participate in Priorities in Funding Rounds, as necessary.
- Prepare requests for fund releases.

Completion of expenditure reports and other documents

- Review expenditure reports and worksheets as required for the reporting of project expenditures, including the Project Information Worksheet for new construction projects.
- Assist with financial and program compliance audits conducted by the OPSC or independent auditor, if requested by the District, including any formal responses necessary.

CALIFORNIA DEPARTMENT OF EDUCATION (CDE) SERVICES / PROCESSES

G. SITE AND PLAN APPROVALS

Prepare requests for site approval for any new schools or acreage added to existing sites:

- Attend site walk with CDE consultant, if needed
- Review site evaluations and reports on the condition of proposed sites conducted by third party professionals paid by the District.
- Review Department of Toxic Substances Control documents
- Prepare and complete required CDE documents to request approval of the site.
- Submit request for CDE's review and approval via CDEbox

Prepare requests for plan approval for new schools or modernized schools:

- Coordinate with architect of record to obtain necessary design development drawings for each project
- Review design development drawings and educational specifications prepared by others
- Prepare and complete required CDE documents to request approval of project plan(s)
- Submit request for CDE's review and approval via CDEbox
- Coordinate with and respond to CDE if any issues or questions arise

GOVERNMENTAL RELATIONS

H. STATE AGENCY UPDATES—Monitor, analyze and advise clients on the following:

- OPSC activities
- State Allocation Board (SAB) actions on programs, regulations, etc.
- SAB Implementation Committee actions and activities
- Proposed and approved school facility legislation

MASTER PLANS

I. PLANNING FOR SHORT AND LONG TERM NEEDS

Assist District-contracted architectural firm with the preparation of the following:

- Determination of state eligibility and funding for the short and long term as part of the District's master plan.

MAXIMIZING FUNDING:
OUR METHODOLOGY

Hancock Park & DeLong INC.
SCHOOL FACILITY CONSULTING

Our process to maximize funding for our clients is unmatched in the industry given our detailed and inside knowledge of the rules and regulations that govern the School Facility Program among other funding sources. While not all-inclusive, our approach is as follows:

1) **The end in mind**—We first seek to understand the ultimate goal of the district for its project. For example, the most obvious is maximizing grant funding from other state and federal agencies. But other important considerations are having a complete understanding of the timing of the project in terms of planning, construction, cash flow, etc. to ensure that any grant funding isn't jeopardized by being unable to meet the grant objectives and rules.
2) **Project scope**—It is equally important to understand the scope of the project. Simply knowing that, for example, ten classrooms need to be built is just not enough to ensure a district receives as much grant assistance as possible. It is just as important to know what exactly is planned for the project in terms of construction, who will be the beneficiaries, and what other agencies may participate in the cost or use of the project. These other considerations also drive funding opportunities.
3) **Reexamination of the past** —We don't assume that a district's eligibility for new construction or modernization funding was correctly completed regardless of whom may have done the analysis. We re-examine all eligibility to ensure no errors were made. By doing so, in the past we have discovered errors that cost districts millions of dollars. Luckily, we have been successful in correcting those errors to the benefit of district's future projects.
4) **Constant contact**—Maximizing funding is not just a one-time task. Districts constantly refine projects and many times a simple renaming of a room during the design process can adversely affect funding. We commit to keeping the lines of communication open. In addition, since state grant funding is driven partly by the project that is approved by the Department of Education, we prefer to complete the CDE plan approval process. This gives us yet another opportunity to provide input at the early stages of the design so that grant funding can be maximized.
5) **Explore all available avenues**—Actual funding for state grants is driven by eligibility. Eligibility can be determined many different ways that we don't overlook, including for new construction: reviewing various enrollment projections such as the use of birth rates in the county and specific district boundaries; impacts of new housing developments; alternative weighting of enrollment trends; and, alternative methods to disaggregate eligibility such as by elementary or high school attendance areas, etc. For modernization, obtaining accurate historical construction data, correct calculations of over-50 year old building eligibility and adjustments for special day classes.
6) **It's not just about getting the money**—After districts receive their grants, our assistance doesn't end there because you have to be able to keep the money as well. In order to retain the grants, it is very important to continue monitoring the project such as how the funds are used, meeting grant rules for disbursement of the cash, and proper reporting of expenses. Our firm can provide helpful consultation all along the way should it be needed.

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REFERENCES

Following are just a few of our longstanding clients that we welcome you to contact:

Alhambra USD	Mr. Keith Matsuo Director of Construction	1515 West Mission Road Alhambra, CA 91803-1618 Phone: 626-643-6544
Centinela Valley Union High SD	John Clem, President, Telacu Construction Management Jessica Keller, Facilities Technician	14901 Inglewood Ave., Lawndale, CA 90260-1251 Phone: 323-855-7053 323-263-3227
Ocean View SD	Michele Hellewell Assistant Superintendent, Business Svs Or Bob Brown, Director of Maintenance, Operations, & Transportation	4200 Olds Rd Oxnard, CA 93033 Phone: 805.488.4441 ext. 1133
Piedmont USD	Michael Brady, Bond Program Coordinator	800 Magnolia Ave. Piedmont, CA 94611 Phone: 510-594-2600
Palm Springs USD	Julie Arthur Executive Director of Facilities Planning	980 E. Tahquitz Cyn Way, Palm Springs, CA 92262 Phone: 760-416-6117
Natomas USD	Jen Mellor, Facilities Technician Facilities and Strategic Planning	1901 Arena Blvd, Sacramento, CA 95834 916.567.5468
Sacramento City USD	Jim Dobson Facilities Management & Operations	5735 47th Ave Sacramento, CA 95824 Phone: 916-643-9233
Jurupa Unified	Trenton T. Hansen, Ph.D. Assistant Superintendent, Facilities Planning or Robin Griffin, Director of Facilities	4850 Pedley Rd Jurupa Valley, CA 92509 Phone: 951-361-6571
San Juan USD	Frank Camarda, Assistant Superintendent, Facilities and Transportation	6135 Sutter Ave Carmichael, CA 95608 Phone: 916-971-5741
Placer Union High SD	Peter Efstathiu, Assistant Superintendent Administrative Services	13000 New Airport Rd Auburn, CA 95603 Phone: 530-886-4400
Lake Elsinore USD	Gregory Bowers Assistant Superintendent, Facilities & Operations	545 Chaney St Lake Elsinore, CA 92530 Phone: 951-253-7015
Happy Valley ESD	Michelle McKinny Superintendent	3125 Branciforte Dr Santa Cruz, CA 95065 Phone: 831-429-1456

PROPOSED FEE

Following is Hancock Park & DeLong, Inc.'s fee schedule*. The District can choose the services it wishes to have completed.

SERVICE	FEE
A. Update eligibility for new construction funding on districtwide basis	$2,500 [a]
B. Update modernization eligibility at a school site (fee is for each site)	$750
C. Completion and submittal of application for funding (for each application)	$4,500
D. Completion and submittal of application for facility hardship funding (for each application and includes Service G)	$12,000
E. Completion and submittal of application for financial hardship assistance	$175/hr [b]
F. State accountability tasks (fund release and expenditure report & audit)	$175/hr [b]
G. Prepare CA Department of Education (CDE) plan approval requests (for each project)	$3,500
H. Governmental relations—state agency updates	$0

[a] If the District is unable to provide specific information on the approved developments within the District's boundaries, if any, Consultant will provide these services at a rate of $175 per hour. Data needed is copy of approved tentative and/or final maps, approval and expiration dates of maps, date permits pulled and number of permits pulled per tract map.

[b] District agrees to pay the Consultant $175 per hour for the services noted above. It is estimated these services would not exceed $1,000 depending on the size of the projects and depth of state audits, if any.

ADDITIONAL COSTS

Any direct travel, meals, and lodging costs, when such expenses are incurred at the request of the client, will be billed at direct cost without mark-up. There are no additional costs unless expressly requested.

*Our fees can be reimbursed with the state grants received presuming there is eligibility to sufficiently cover the costs of construction and soft costs.

Marnie Casteel

From: Jon Ray
Sent: Wednesday, October 09, 2019 11:45 AM
To: Marnie Casteel
Subject: FW: Gov. Newsom signs school bond bill

More backup for 8.2

Jon Ray, Superintendent
Bishop Unified School District
760-872-3680

From: CSBA [mailto:csba@csba.org]
Sent: Monday, October 7, 2019 1:16 PM
To: jray@bishopschools.org
Subject: Gov. Newsom signs school bond bill

Trouble viewing this email? **Click here »**

csba
California School Boards Association

Gov. Newsom signs $15 billion school facilities bond bill today in Sacramento



Gov. Gavin Newsom this morning signed **Assembly Bill 48 (O'Donnell & Glazer), the Public Preschool, K-12, and College Health and Safety Bond Act of 2020**, which places a **$15 billion** school facilities bond on the March 3, 2020 ballot.

Click here to view a Facebook Live

stream of the bill's signing.

If passed by voters on March 3, a total of **$9 billion** in school facilities bond money would go to K-12:

- **$2.8 billion** for new construction
- **$5.2 billion** for modernization
- **$150 million** for lead in water testing and remediation
- **$500 million** for Career Technical Education
- **$500 million** for charter schools

Community Colleges, California State and University of California systems would each receive $2 billion.

AB 48 would also make several programmatic changes to the school facilities program, **all of which are contingent on the measure being passed by voters on March 3**. If the measure is not passed, the changes described below would **not** become operative:

<u>If passed by voters, AB 48 would:</u>

- Change the process by which applications will be processed and the level of funding school districts can expect:
    - The existing funding model provides a state match equal to the local match **(50 percent/50 percent)** for new construction projects, with a slightly higher state match for modernization projects **(60 percent/40 percent)**.
    - As calculated by a new funding formula, state grant amounts would increase.
    - The new funding formula evaluates a district's ability to generate local funds (Assessed Value and Bonding Capacity) and the percentages of low income, foster care and English learner students.
    - Grant amounts would range anywhere from **50 percent to 55 percent** (new construction) and from **60 percent to 65 percent** (modernization).
- Increase bonding capacity for unified school districts from 2.5 percent to 4 percent of assessed valuation and from 1.25 to 2 percent for elementary and high school districts.
- Provide immediate assistance (i.e. temporary facilities) for schools impacted by disasters.
- Authorize state bond funds to be spent on constructing or renovating existing classrooms to serve preschool students.
- Give priority to projects that address fire and life safety issues, seismic deficiencies and critical deferred maintenance issues.
- Establish a process to assist small school districts in applying for funds and access to funds.
- Temporarily modify certain developer fees.
- Provide a supplemental grant for the design and implementation of energy efficiency features.

- Require the submission of a facilities master plan as a condition of receiving funding.



California School Boards Association | 3251 Beacon Blvd., West Sacramento, CA 95691
Phone: (800) 266-3382 | Fax: (916) 371-3407
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