

Board Office Use: <b>Legislative File Info.</b>	
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Enactment Number	20-1115
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# Memo

**To** Facilities Committee

**From** Kyla Johnson-Trammell, Superintendent  
Jody Talkington, Sr. Director Strategic Projects  
Tadashi Nakadegawa, Acting Deputy Chief of Facilities Planning and Management

**Committee Meeting Date** June 12, 2020

**Subject** Resolution to Approve Asset Management and Real Property Services Firms for a Qualified Pool of Providers

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**Action** Vote to recommend the approval by the full board of Resolution #1920-0259 Designating Five Firms as Qualified for Specific Asset Management and Real Property Services.

**Background** The Board of Education has long prioritized Asset Management, potential revenue generation, and the need for assistance to ensure appropriate disposition of District sites which may not be needed for educational and support purposes. One of the first steps taken by the Board has been to complete a 7-11 Committee process in 2019/2020 and initiate disposition of five identified vacant sites—four sites are being pursued for revenue generation. In addition, there are multiple potential sites which are either vacant, or under-utilized which may need to be considered for disposition as part of an overall Asset Management strategy. Following the most recent discussions with the Board at the Asset Management retreat, District staff initiated a process to select a firm or firms to assist the District with Asset Management and Real Property Services.

District staff team prepared a Request for Qualifications and Proposals (RFQP) for Asset Management and Real Property Services. The RFQP document is attached to this item.

The RFQP was issued on April 13, 2020. The District followed a transparent and structured process including: identifying the scope of services; including contractual requirements; stating evaluation criteria; holding a Pre-Submittal Conference; taking written questions and providing answers through written Addenda. Five firms submitted Statements of Qualifications and Proposals electronically on May 13,

2020. The five firms are: Dominic Dutra, 3D Strategies, Inc.; DCG Strategies, Inc.; Schimmel Project Management; Heafey Commercial; and, Devine and Gong, Inc.

## **Discussion**

Each firm submission is provided as an attachment to this item. Evaluation of the five submittals proceeded with an initial paper screening by District staff, using the evaluation criteria contained in the RFQP. Virtual interviews were then held with all five firms. Each of seven reviewers scored all firms through the paper screening, with five of the reviewers also including their interview scores. These are tabulated on the attached Scoresheet.

Cost proposals were reviewed and summarized for the team on the attached scoresheet. Three of the firms submitted for the full scope of services and provided proposals for hourly consulting and in some cases identified not to exceed costs for specific tasks outlined in the Scope of Services portion of the RFQP. In addition, several firms outlined transaction fees related to leases and real property disposition that are a standard approach to providing these services. In general the transaction fees were similar. Because of the variations in fee information and approaches it was not possible to evenly evaluate the firms based upon their fees.

The highest ranked firm, recommended for an initial Asset Management Contract for OUSD, is DCG Strategies, Inc. This was a strong, diverse team with a deep knowledge of Oakland and an understanding of our various communities.

The RFQP left open the possibility that more than one firm could be designated as qualified, providing the District with options for selection of a firm for specific services where they are specialists. Two of the larger firms have deep experience in school district revenue generation and one has specific expertise in property exchange. Two of the smaller firms brought specific expertise and experience—one in affordable housing and the other in Oakland commercial real estate, which could prove valuable as OUSD's asset management process unfolds. Creating a pool of qualified providers provides the District with flexibility for future work.

Therefore, Resolution #1920-0259 would designate all five firms as qualified to provide Asset Management and Real Property Services in specific areas of expertise for the Oakland Unified School District.

## **Fiscal Impact**

No impact at this time. The fiscal impact will come when individual contracts are brought forward for ratification/approval by the Board.

## **Attachments**

[Request for Qualifications and Proposals for Asset Management and Real Property Services, April 13, 2020;](#)

Statements of Qualifications and Proposals from five firms;

[DCG Strategies](#)

[Schimmel Project Management](#)

[3D Strategies](#)

[Divine and Gong](#)

[Heafey Commercial](#)

Evaluation Scoresheet: Tabulation of Scores and Cost Proposals  
Summary

**RESOLUTION OF THE BOARD OF EDUCATION OF THE  
OAKLAND UNIFIED SCHOOL DISTRICT**

**Resolution No. 1920-0259**

**Designating Five Firms as Qualified for Specific Asset Management and Real Property Services**

**WHEREAS**, the Oakland Unified School District is deeply committed to the vision of Oakland being home to high quality public education options for all students and families;

**WHEREAS**, to realize this vision, the District's Board of Education ("Board"), directed the District's Superintendent to develop a "Citywide Plan" that promotes the long-term sustainability of publicly-funded schools across Oakland that represent quality and equitable educational options (see District's Quality School Development: Community of Schools Policy (Board Policy No. 6006));

**WHEREAS**, among the specific goals of the District through the Citywide Planning process is to best leverage vacant, underutilized, and surplus properties so that (i) high-quality publicly funded schools across Oakland are able to serve all of its students, (ii) a fiscally sound number of schools exist given OUSD's student population, and (iii) schools are located where more high quality options are needed;

**WHEREAS**, as part of the District's Citywide Planning process, the District has identified potentially underutilized school and support sites throughout the District that the District is interested in investigating further in order to help accomplish the above-discussed goals;

**WHEREAS**, the District, with input and guidance from its advisory committee, the "7-11 Committee," with extensive public outreach and communication, has completed investigation of the reuse and potential lease, or rental of a first group of vacant and underutilized District school sites, and;

**WHEREAS**, the District's 7-11 Committee was guided by OUSD Board Policy 7350 which specifically prioritizes long term lease of properties over sale of properties, and;

**WHEREAS**, the District's 7-11 Committee has completed its work and made recommendations regarding such vacant and underutilized District school sites to the Board of Education, including: (1) former Edward Shands Adult Education Center; (2) former Tilden Child Development Center (CDC); (3) former Sankofa CDC (removed from consideration during the process); (4) former Piedmont CDC; (5) former Webster CDC, and;

**WHEREAS**, the Board of Education accepted the 7-11 Committee's Report and Recommendations and did declare the former Shands Adult Education Center and the former Tilden Child Development Center surplus property, and;

**WHEREAS**, the Board of Education accepted the 7-11 Committee's Report and Recommendations regarding not declaring the Piedmont CDC and Webster CDC surplus, but rather pursuing leases allowable under Education Code 17527 or other provisions which may be applicable without surplus designation, and;

**WHEREAS**, the Board of Education has continued to express the need for disposition of both the surplus and vacant properties reviewed by the 7-11 Committee, and;

**WHEREAS**, District staff has prepared and circulated a Request for Qualifications and Proposals (RFQP) for Asset Management and Real Property Services to engage qualified firms in assisting the District with next steps in property disposition, and;

**WHEREAS**, District staff received Statements of Qualifications and Proposals, and evaluated the submissions in accordance with the criteria contained in the RFQP, and;

**WHEREAS**, the firms have been ranked and assessed for qualifications in specific areas of expertise and in accordance with the RFQP it is appropriate to consider multiple firms as qualified in order to provide flexibility for the District, and;

**WHEREAS**, it is appropriate at this time to designate qualified firms and award initial contracts to accomplish the goals as identified by the Board of Education.

**NOW, THEREFORE, BE IT RESOLVED THAT** the Governing Board of the Oakland Unified School District hereby resolves, determines, and finds as follows:

1. The foregoing recitals are adopted as true and correct, and incorporated herein by this reference.
2. Designate the following firms as a pool of Qualified Asset Management and Real Property firms, with specialty areas as noted:
  - i. DCG Strategies, Inc., expertise in community-based property disposition and Workforce Housing
  - ii. Schimmel Project Management, expertise in property exchange
  - iii. Dominic Dutra, 3D Strategies, Inc., expertise in large property transactions
  - iv. Heafey Commercial, expertise in Oakland Commercial Real Estate
  - v. Devine and Gong, Inc., expertise in affordable housing.

**PASSED AND ADOPTED** by the Board of Education of the Oakland Unified School District this 24<sup>th</sup> day of June, 2020, by the following vote:

PREFERENTIAL AYES: None

PREFERENTIAL NOES: None

PREFERENTIAL ABSTENTION: None

PREFERENTIAL RECUSAL: None

AYES: Aimee Eng, Jumoke Hinton Hodge, Gary Yee, James Harris, Vice President Shanthi Gonzales,  
President Jody London

NOES: None

ABSTAINED: None

RECUSED: None

ABSENT: Roseann Torres, Mica Smith-Dahl (Student Director), Denilson Garibo (Student Director)

### CERTIFICATION

We hereby certify that the foregoing is a full, true and correct copy of a Resolution passed at a Regular Meeting of the Board of Education of the Oakland Unified School District, held on June 24, 2020.

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### OAKLAND UNIFIED SCHOOL DISTRICT



\_\_\_\_\_  
Jody London  
President, Board of Education



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Kyla Johnson-Trammell  
Secretary, Board of Education



APPROVED AS TO FORM