

Orchard Park Redevelopment
Project Advisory Committee
Recommendations Regarding Project Development Strategy

# ORCHARD PARK REDEVELOPMENT PROJECT ADVISORY COMMITTEE

#### **Co-Chairs**

Prasant Mohapatra, Vice-Provost and Dean, Graduate Studies Adela De La Torre, Vice Chancellor, Student Affairs

#### **Project Advisory Committee (PAC) Members**

Emily Galindo, Associate Vice Chancellor, Student Affairs
Bob Segar, Assistant Vice Chancellor, Campus Planning and Community Resources
Grant Rockwell, Assistant Vice Chancellor, Capital and Real Estate
Clayton Halliday, Associate Vice Chancellor, Campus Architect
Kellie Sims Butler, Assistant Dean, Graduate Studies
Mike Sheehan, Director, Student Housing
Mark Rutheiser, Associate Director, Real Estate Services
Corey Coates, Resident Advisor, Solano Park Student Housing
Sarah Messbauer, Graduate Student Assistant to the Dean and Chancellor
Arik Davidyan, Graduate Student
Laurynne Chetelat, Graduate Student
Jonathan Fuchs, Graduate Student

# Orchard Park/West Village Request for Proposal Subcommittee Members

Kellie Sims Butler, Assistant Dean, Graduate Studies
Corey Coates, Resident Advisor, Solano Park Student Housing
Laurynne Chetelat, Graduate Student
Jonathan Fuchs, Graduate Student
Lucas Griffith, Campus Planner
Ramona Hernandez, Director,
Mark Rutheiser, Associate Director, Real Estate Services
Mike Sheehan, Director, Student Housing
Amanda Steidlmayer, Strategic Initiatives Coordinator, Graduate Studies

#### **Developer Selection Subcommittee Members**

Emily Galindo, Associate Vice Chancellor, Student Affairs
Bob Segar, Assistant Vice Chancellor, Campus Planning and Community Resources
Kellie Sims Butler, Assistant Dean, Graduate Studies
Grant Rockwell, Assistant Vice Chancellor, Capital and Real Estate
Mike Sheehan, Director, Student Housing
Mark Rutheiser, Associate Director, Real Estate Services
Corey Coates, Resident Advisor, Solano Park Student Housing
Sarah Messbauer, Graduate Student Assistant to the Dean and Chancellor
Laurynne Chetelat, Graduate Student

# **CONTENTS**

CHARGE TO THE COMMITTEE	4
EXECUTIVE SUMMARY	6
FINAL REPORT OF THE COMMITTEE	7
Part 1: Exploration of Project Partnership Options	7
Project Cost	7
Rental Rates	8
Viability of the Hybrid P3 Delivery Option	8
Part 2: Development Partner Selection Process	9
Stage 1A: Request for Proposals	9
Stage 1B: Interview	9
Stage 2A: Design Charrette	9
Stage 2B: Interview	10
Part 3: An Inclusive Process	11
Part 4: Final Committee Recommendations to the Provost	12
PAC Recommendations per the March 2, 2016 Redevelopment Status Report	12
Additional PAC Recommendations	13
APPENDIX A: MAJOR PROJECT MILESTONES	14
APPENDIX B. ORCHARD PARK PROJECT PRIORITIES PLAN	15
APPENDIX C DECISION PROCESS DIAGRAM	16

# CHARGE TO THE COMMITTEE

April 12, 2016

VICE CHANCELLOR ADELA DE LA TORRE

(CO-CHAIR)

Student Affairs

VICE PROVOST & DEAN PRASANT

MOHAPATRA (CO-CHAIR)

Graduate Studies

ASSOCIATE VICE CHANCELLOR

EMILY GALINDO Student Affairs

ASSISTANT DEAN KELLIE SIMS BUTLER

Graduate Studies

DIRECTOR MIKE SHEEHAN

Student Housing

EXECUTIVE DIRECTOR MARY HAYAKAWA

Real Estate Services

Design and Construction Management

CAMPUS ARCHITECT CLAYTON HALLIDAY ASSOCIATE DIRECTOR MARK RUTHEISER

Real Estate Services

DIRECTOR CHRISTINE McUMBER,

Capital and Space Planning

ASSISTANT VICE CHANCELLOR BOB SEGAR

Campus Planning and Community Resources

ASSISTANT DIRECTOR LESLIE CARBAHAL

Capital and Space Planning

JAMIELLA BROOKS

Graduate Student Advisor

**COREY COATES** 

Graduate Student Advisor

LAURYNNE CHETELAT

Graduate Student Advisor

ERICA VONASEK-ECO

Graduate Student Advisor

ARIK DAVIDYAN

Graduate Student Advisor

KARL LARSON

SARA PETROSILLO

Graduate Student Advisor

Alternate Graduate Student Advisor

RE: Appointment of the Project Advisory Committee for the Orchard Park Redevelopment Project

#### Dear Colleagues:

I invite you to serve on the Project Advisory Committee (PAC) for the Orchard Park Redevelopment project. Built in 1964, Orchard Park served as apartment-style housing for students with families until 2015 when the facility was closed to prepare for redevelopment. The Student Family Housing Redevelopment Committee considered the future of student family housing at UC Davis and issued a report in June 2015 recommending principles related to future student family housing. The Orchard Park Redevelopment Status Report ("Status Report") issued March 2, 2016 recommends redevelopment of the existing Orchard Park.

In order to provide student family housing at UC Davis, this PAC is charged with the implementation of the vision for redevelopment of Orchard Park as outlined in the Status Report (attached). It is anticipated that the redevelopment project will proceed in partnership with a third-party developer,

Project Advisory Committee for the Orchard Park Redevelopment Project April 12, 2016 Page 2

recognizing the University's commitment to affordability and quality of life, and student engagement as outlined in the Status Report.

Vice Chancellor Adela de la Torre and Vice Provost and Dean Prasant Mohapatra will co-chair the committee and Executive Director Mary Hayakawa from Real Estate Services will facilitate the process for identifying the developer partner for the project. Appropriate consultation with graduate students will be part of the project planning consistent with the leadership-endorsed recommendations of the Student Family Housing Redevelopment Committee. I also ask the PAC to consult with the broader campus community and other campus units to ensure proper coordination throughout the planning process.

The redevelopment of Orchard Park to provide quality and affordable housing options for our students with families is of the utmost importance to the campus. I am certain the PAC will remain committed to creative problem-solving and strategies that demonstrate the wise use of campus resources to achieve a significant unmet need. I know this project will require a significant investment of your time over the coming years. Your work on this committee is critical to the success of the project and I thank you for taking on this important task.

Sincerely,

Ralph J. Hexter

Provost and Executive Vice Chancellor

igh / Nessen

Dave Lawlor

Vice Chancellor and CFO

Finance, Operations and Administration

## **EXECUTIVE SUMMARY**

In response to the April 12, 2016 charge letter from the Provost, the Project Advisory Committee (PAC) explored project delivery options and potential development partners for the UC Davis Orchard Park project. This work included a series of public meetings, workshops, consultations and presentations to gather input from community members and professional experts. Criteria used in the review of delivery options were taken from the March 2, 2016 Orchard Park Status Report.

Initial exploration of project delivery options included a feasibility analysis by Keyser Marston Associates (MKA), a consultant who worked in conjunction with UC Davis Design and Construction Management (DCM). Based on these estimates, the PAC initially recommended a partnership with Tandem Properties to allow the Orchard Park project to be combined with the Russell Park residential area. However, guidance from UC Office of the President and General Counsel indicated that this was not an option within the parameters of the President's Student Housing Initiative.

To enable potential development partners to reduce construction costs through economies of scale, the Request for Proposal allowed applicants to combine the Orchard Park redevelopment project with the West Village Transfer Student Housing project. A *Request for Proposals* was distributed to all eight of the developers pre-approved under the President's Student Housing Initiative. Six companies submitted proposals. After review of the proposals, four companies (American Campus Communities, University Student Living, EdR and Hunt Companies) were invited to continue in the selection process. After an initial interview, three companies were selected to proceed to the second stage of the review. In the second stage of the selection process, USL, American Campus Communities and Hunt Companies organized a design charrette and submitted a final detailed proposal. At the end of the second stage, the selection committee selected University Student Living to enter into exclusive negotiations for the Orchard Park Redevelopment and West Village Transfer Student Housing projects.

The committee recommends that the oversight of the project be transferred to the Student Housing and Dining PAC, where it can be considered in the context of the larger portfolio of on-campus housing. Direct collaboration with USL should be divided among three working groups comprised of UC experts in the areas of finance, project management, and housing operations:

Table 1. Orchard Park Working Groups

Working Group	UC Davis Team Leads	Workgroup Objectives
Design/Construction	Mark Rutheiser Mike Sheehan	Master plan, schematic design, design development, construction documents, project delivery.
Finance/Legal Workgroup	Allen Meacham Grant Rockwell	Pre-development agreement, term sheet, ground lease, ancillary agreements, ownership, financing schedule
Operations/Maintenance/ Residential Life Workgroup	Emily Galindo	Operating and maintenance plan, resident life, operating agreement

Finally, the PAC recommends that campus administrators continue to engage students about issues impacting student housing by giving project updates to the ASUCD, GSA and Solano Park residents, and holding regularly scheduled town hall meetings. Separately, administrators should address concerns about student academic wages.

## FINAL REPORT OF THE COMMITTEE

# Part 1: Exploration of Project Partnership Options

While the committee charge letter anticipated a traditional partnership with a development company, the PAC explored other delivery options in the hopes of finding one that would reduce the cost of the project and be responsive to student preference for the project to be built and managed by the university. Three delivery options were considered:

## **Delivery Option 1: Campus Delivery**

The campus funds the entire development of the project. The project would be overseen by DCM, potentially as "Design-Build" or "Design-Bid-Build" with a general contractor. Upon completion, operations, leasing and programming would be overseen by Student Housing and Dining Services.

#### **Delivery Option 2: Third Party Developer (P3)**

A developer-builder designs, constructs and operates the housing project on campus-owned land under a ground lease. Rents for the apartments are determined as part of the ground lease structure. Ground rent paid to the campus is determined by the value of the property and the terms of the ground lease.

#### <u>Delivery Option 3: Tandem Partnership (Hybrid P3)</u>

In partnership with Tandem Properties, the existing ground lease at Russell Park would be restructured to increase the lease term, and to expand the Russell Park boundary to include Orchard Park. The extension of the ground lease would guarantee long-term rental revenues to Tandem Properties. The expansion of the lease would include the development rights to Orchard Park and subsequent rental income for the apartment property. Under this structure, the University would forgo ground lease income in exchange for the rental affordability structure being proposed.

#### **Project Cost**

As a first step to explore the three delivery options, the PAC engaged Keyser Marston, a consultant who worked in conjunction with UC Davis DCM to develop price estimates for each option. The preliminary cost estimates are shown in Table 2, below.

Table 2. Preliminary Project Cost Analysis of Possible Delivery Options

	Delivery Options			
Modeling Assumptions	Option 1 Campus Delivery	Option 2 Third Party Developer (P3)	Option 3 Tandem Partnership (Hybrid P3)	
Site Size (gross acres)	19	19	19	
Dwellings (units)	476	476	504	
Beds (single occupancy)	844	844	1,008	
Density (du/acre)	25.1	25.1	26.5	
Building Prototype	2-4 story, low rise (Type V)	2-4 story, low rise (Type V)	3-story, low rise (Type V)	
Parking (# of spaces)	574	574	450	

Table 2. Preliminary Project Cost Analysis of Possible Delivery Options

	Delivery Options			
Modeling Assumptions	Option 1 Campus Delivery	Option 2 Third Party Developer (P3)	Option 3 Tandem Partnership (Hybrid P3)	
Net Building Area (NSF)	406,800	406,800	393,312	
Gross Building Area (GSF)	452,000	452,000	413,878	
GSF/Beds	536	536	411	
Efficiency	90%	90%	95%	
Total Project Cost	\$157.9M	\$127.5M	110.0M	
Evaluation	Not feasible	Feasible	Best	

Note: All cost assumptions included prevailing wages, and UC sustainability and energy efficiency requirements.

#### **Rental Rates**

The Keyser Marston feasibility study indicated that a Traditional P3 project delivery with no ground lease rent payments to the university would be unable to provide any below market rate units. For the campus delivery option, the Keyser Marston feasibility study indicated that to achieve the same rents as the Traditional P3 model with no affordable units, an upfront campus equity investment of \$25.3M would be required to fund the project to achieve the required 1.10 debt coverage ratio. This study also indicated that if the campus delivery project mix was adjusted to incorporate 200 affordable units (160 2-bedrooms, 40 1-bedrooms) based on current rents at Solano Park, the upfront campus equity investment required to achieve the 1.10 debt coverage ratio would increase to \$60.2M.

Table 3. Detailed Summary of Projected Monthly Rental Rates

	Projected Monthly Rental Rates (Number of Units)			
Partnership Option	1 bed/1bath	2 bed/1bath	2 bed/2bath	3 bed/2 bath
Option 1: Campus Delivery	Not feasible due to debt financing restrictions and required equity investment.			
Option 2: Third Party Developer (P3)	\$1,538	N/A	\$2,009	N/A
Option 3: Tandem Partnership (Hybrid P3)	N/A	\$1,000 (200) \$1,250 (100)	\$2,100 (300)	TBD

Notes: All construction costs and rental rates are based on estimates only and do not reflect a final proposal. The rental rates under the "Hybrid" P3 model are based on the assumption that the developer would "subsidize" affordable rents by obtaining a long-term ground lease extension for the Russell Park project. Affordability is driven by the use of existing apartment stock and the related low cost basis for this apartment stock.

Based on this initial financial analysis, the PAC chose to pursue the Tandem Partnership (Hybrid P3) option. The hope was that this partnership would meet the university financing requirements and result in the lowest construction costs that would, in turn, result in a significant number of affordable units.

# Viability of the Hybrid P3 Delivery Option

Staff members from UC Davis Real Estate Services communicated with the UC Office of the President (UCOP) to determine if this project would qualify for an exception to the President's Student Housing Initiative. Staff also consulted with the UC Office of General Counsel (General Counsel) to evaluate the potential extension and expansion of the existing Russell Park ground lease to include Orchard Park Site. In March 2017, UCOP staff indicated that this option was not possible. Similarly, General Counsel indicated that an expansion of the Russell Park lease was not possible.

With the Hybrid P3 delivery option eliminated, the PAC moved to consider a partnership with a third party developer. Given the results of the Keyser Marston feasibility study, the PAC was concerned about affordability of a traditional partnership. To enable potential development partners to use economies of scale to reduce construction costs, the Request for Proposal allowed applicants to combine the Orchard Park redevelopment project with the West Village Transfer Student Housing Project.

# Part 2: Development Partner Selection Process

#### Stage 1A: Request for Proposals

A *Request for Proposals* was distributed to all eight of the developers approved under the President's Student Housing Initiative. Six companies submitted proposals. Decision criteria for this stage included:

- 1. Developer team qualifications
- 2. Past project examples
- 3. Project approach: Affordability, draft schedule and work plan, communications strategy, facilities management, and optimizing developmental potential

After review of the proposals, four companies (American Campus Communities, USL, EdR and Hunt Companies) were invited to continue in the selection process.

#### Stage 1B: Interview

While interviewing the remaining four companies, the Selection Committee looked for further evidence of team qualifications, project examples (experience) and project approach. Additionally, committee members observed the applicants for communication skills and commitment to collaboration. After the interview, one applicant was eliminated from the selection process.

## Stage 2A: Design Charrette

In the second stage of the selection process, USL, American Campus Communities and Hunt Companies hosted design charrettes. During the charrettes, members of the selection committee evaluated the applicants based on the following:

- 1. Responsiveness to student community culture (understanding of the different needs among the transfer student, graduate student and family communities)
- 2. Ability to listen and communicate effectively with members of the UC Davis community
- 3. Willingness to share ownership of the planning process
- 4. Evidence of collaboration among the development team partners
- 5. Ability to translate client's needs into design
- 6. Overall assessment of ability to work with the development team.

In addition, the members of the selection committee reviewed the revised project designs for the following:

- 1. Preservation of open spaces
- 2. Affordability (inclusion of units with market rate rents to subsidize affordable housing; using

- design to achieve reasonable costs and limit rent inflation)
- 3. Architecture (design that contributes to the well-being of students)
- 4. Well-designed circulation (management of car, pedestrian and bicycle access, community interaction)
- 5. Sustainability (commitment to UC Davis' sustainability goals)

Finally, members of the selection committee communicated information about amenities gathered during the Mithun "amenitizing" workshops to the four design teams. Overall, the selection committee emphasized the need for a design that supported the mental health and interpersonal relationships of students during their rigorous, academic careers at UC Davis. Candidates were advised that students used open spaces to build community; therefore, amenities like grills, picnic tables, and play areas should be incorporated into the outdoor areas. Within units, candidates were asked to consider closet space that was sufficient enough for baby gear, bike storage within the unit and on balconies, and separated bathrooms. There was also an extensive discussion as to whether laundry machines should be included in the units. Applicants were asked to perform a financial analysis to determine the impact to rents, depending on whether laundry machines were in-unit or in shared spaces. Finally, the selection committee indicated to the design teams that any amenity included in designs should be cost-efficient for renters and environmentally sustainable.

Additional guidance provided to the developers included:

- 1. Do not include a community garden as one nearby could be available to residents.
- 2. If the number of parking spaces is kept minimal, alternative parking options should be provided to residents (e.g., remote parking lots). A smaller parking area should be created near family housing to make the units more accessible to residents carrying children.
- 3. Graduate student units might be furnished, but family units should be unfurnished because the furniture needs of families depend on the ages of their children.
- 4. There is a preference for high dividers between the patios of the family units to ensure privacy. However, fences looking into the courtyards should be lower as to allow residents to see kids playing from their patio.
- 5. Bike storage design should take into consideration the need for security and bikes with buggies.
- 6. The design should enable staff to access major mechanical systems without inconvenience to the residents (e.g., hallway access to the water heaters).

# Stage 2B: Interview

During the interview portion of the Stage 2, development teams were asked to provide an in-depth analysis of projected construction and financing costs, using the pro-forma <u>templates</u> provided on the Orchard Park RFP website. The Selection Committee asked the development teams to justify specific items in their proposals and to identify strategies for minimizing costs (e.g., procuring materials nationally or internationally if materials in the local market became too costly). Discussion about financing costs focused on bond and financing mechanisms that could be employed to reduce project costs.

At the end of the second stage, the selection committee selected USL to enter into exclusive negotiations for the Orchard Park Redevelopment and West Village Student Transfer Housing projects.

## Part 3: An Inclusive Process

The following steps were taken to solicit student input, and to inform members of the UC Davis and City of Davis communities of the project status:

- 1. Monthly PAC meetings that were open to the public.
- 2. Orchard Park PAC <u>website</u> that included PAC meeting minutes, reports, calendar of PAC activities, and a "contact us" form.
- 3. Walking tours with Mithun, an architecture and design consulting firm and "amenitizing" workshop #1 (June 23, 2016).
- 4. The Mithun "amenitizing" workshop #2 (October 24, 2016). This event was promoted to students through:
  - An announcement in the Graduate Studies monthly newsletter, GradLink (October 12, 2016)
  - GradPathways weekly newsletter (October 24, 2016)
  - Email invitations to graduate program coordinators to forward to students (October 12, 2016)
  - A Facebook event (4 "interested", 268 reached, 13 visits to event page)
  - Email invitation sent to Corey Coates for promotion to Solano Park residents (October 13,2016)
  - Eventbrite event created for Mithun Workshop (27 registered, 120 total page views)
  - Posts on Facebook/Twitter
- 5. Status Update <u>Letter</u> to the Graduate and Professional Students from the Vice Provost of Graduate Education posted online (October 13, 2016).
- 6. Interim Chancellor Hexter's letter to the City of Davis City Council (January 25, 2017).
- 7. Publication of the Orchard Park Priorities Plan (May 8, 2017).
- 8. A public, online Request for Proposal (https://studenthousingrfp.ucdavis.edu) (May 30, 2017).
- 9. Four student representatives and a Solano Park residential advisor served on the PAC, each dedicating approximately 90 hours of service to the project.
- 10. UC Davis news articles published on <u>January 25, 2016</u>, <u>April 24, 2017</u>, <u>June 2, 2017</u>, <u>June 6, 2017</u>, August 29, 2017 and September 27, 2017.
- 11. California Aggie articles published on May 16, 2017 and September 28, 2017.
- 12. Presentations to the Graduate Student Association on October 5, 2016, November 2, 2016, February 1, 2017, April 5, 2017 and May 2, 2017. In addition, the Graduate Student Assistant to the Dean and Chancellor who served on the PAC also reported back to the GSA during their executive council and general assembly meetings from January to June 2016.
- 13. Presentation at ASUCD on October 26, 2017.
- 14. Presentation to Solano Park residents on December 1, 2016, January 19, 2017, and March 16, 2017.
- 15. Davis Enterprise articles published on July 2, 2017 and September 29, 2017.
- 16. Davis Vanguard September Conclave on Housing (September 27, 2017).
- 17. UCD Housing table at the 2017 Graduate Student Orientation (September 2017).
- 18. Meeting with staff and parents from Russell Park Child Development Center (October 2017).

# Part 4: Final Committee Recommendations to the Provost

# PAC Recommendations per the March 2, 2016 Redevelopment Status Report

Table 5. PAC Recommendations

Table 5. PAC Recommendation	15	
2016 Redevelopment Status	PAC Recommendations	PAC Comments
Report Recommendations	1 Ac Recommendations	TAC Comments
Develop the project within the University rather than engaging a third-party developer.	Enter exclusive negotiations with University Student Living.	Financing constraints (as shown in Table 2) make a university-financed project infeasible. As an alternative, the PAC explored a hybrid delivery option in partnership with Tandem Properties, but this option was not permitted by UCOP. Therefore, the PAC recommends the selection of USL, who will, in turn, deliver the project to a non-profit entity. This allows access to tax-exempt financing which is less costly than private debt.
Couple rents to graduate student income.	Align rents for family units with the current rates at Solano Park.	Affordable rents for family units were set at \$1,000/unit in 2017 dollars. This was the lowest rate possible given current project costs, and reflects the PAC's priority that students currently residing at Solano Park will not face price shock in the transition to the Orchard Park site. Additional attention to the relationship between graduate student income and cost of living should be addressed by Employee and Labor Relations, Graduate Studies and the representative union leaders.
Solicit donations to help subsidize construction costs and/or rents.	Out of PAC scope.	Refer to Development and Alumni Relations for consideration.
Include at-market units on the property to help subsidize affordable rents for family housing.	Completed.	Tentative project plans include 200 affordable units with the remaining units to be rented at market rate.
Provide a variety of apartment types (studios, 1, 2 and 3 bedrooms) and limit sizes to maintain affordability.	Completed.	Initial project plans include unit types ranging from studios to 4-bedrooms.
Include safe play areas visible from apartments and preserve open, shady space between buildings;	Completed.	Initial project plans include play areas within six family courtyards, a green area with community center and preserved open space in the grove.
Keep family housing on campus.	Completed.	
Student Housing should develop a more collaborative approach to managing student family housing.	Student Housing should define relationship to USL in terms of operations and management during the	
	ground lease negotiation.	

#### **Additional PAC Recommendations**

#### 1. Continue to provide regular reports on the Orchard Park project to students.

- Transfer oversight of the Orchard Park Redevelopment Project to the Student Housing and Dining PAC.
- Share information about the project by updating the Student Housing website and sending targeted email messages to current Solano Park residents.
- Participate in the GSA Housing Town Hall on Campus Housing, scheduled for 8:30am on Friday, December 1 at the South Silo.

# 2. Address the interests of students at appropriate stages of the project, as recorded in the Orchard Park Project Priorities Plan.

- Establish procedures to ensure family prioritization at Orchard Park.
- Consult with the Center for Student Affairs Assessment about strategies for collecting additional student input, if needed.

# 3. Provide guidance and information to current Solano Park residents.

- Give priority of Orchard Park units to current, family residents in Solano Park.
- Guarantee that Solano Park will not close prior to the opening of Orchard Park.
- Define a project timeline for the redevelopment of Solano Park.

# 4. Outline collaborative management procedures in the ground lease negotiations.

- Define the process for maintaining high customer service to residents, including the prompt addressing of resident complaints.
- Establish criteria and plan to evaluate applicant eligibility to live in student housing.
- Establish criteria for fair and equitable distribution of below-market rental units.
- Establish a property management services annual evaluation by UC Davis Student Housing.
- Identify affordable security deposit options and alternatives.
- 5. The committee recommends that the oversight of the project be divided among three working groups, comprised of UC experts in the areas of finance, project management, and housing operations:

Table 5. Orchard Park Working Groups

Working Group	UC Davis Team Leads	Workgroup Objectives
Design/Construction	Mark Rutheiser Mike Sheehan	Master plan, schematic design, design development, construction documents, project delivery.
Finance/Legal Workgroup	Allen Meacham Grant Rockwell	Pre-development agreement, term sheet, ground lease, ancillary agreements, ownership, financing schedule
Operations/Maintenance/ Residential Life Workgroup	Emily Galindo	Operating and maintenance plan, resident life, operating agreement

# **APPENDIX A: MAJOR PROJECT MILESTONES**

Year	Milestone
2014	The 200-unit Orchard Park apartment complex was permanently shuttered having reached both functional obsolescence and the end of its useful life. During that same year, redevelopment plans for a new apartment project at this location were put on hold primarily due to concerns about affordability for future residents.
2015	Student Housing Redevelopment Committee released its final report that focused on the needs of students with families and limited financial resources. The key output of this report was three primary recommendations for the redevelopment of Orchard Park:
	<ul> <li>Affordability – Includes issues that impact construction costs, rental rates, and students' ability to afford the apartments.</li> </ul>
	<ul> <li>Facility Design – Includes apartment size and design, housing density (units per acre) and shared indoor and outdoor public spaces (e.g., the community center, green space, and playgrounds).</li> </ul>
	<ul> <li>Quality of Life – Includes issues that affect the residents' quality of life, such as community support programs, policies, and procedures that contribute positively to a sense of community and belonging for students and their families."</li> </ul>
2016	(January) Student representatives from the Student Housing Redevelopment Committee met with Vice Chancellor and CFO Lawlor, Vice Provost and Dean Gibeling and Associate Vice Chancellor Galindo to discuss the status of the Orchard Park Project. The group evaluated the renovation costs of the existing facility in contrast to a complete redevelopment project, and it was subsequently determined that a renovation was not possible.
2016	(April) The Orchard Park Redevelopment PAC ("PAC") was formally charged by the Provost and Executive Vice Chancellor Hexter and Vice Chancellor and CFO Lawlor to develop a vision and recommendation for the redevelopment of Orchard Park with broad campus representation. This representation currently included: graduate student representatives, Graduate Studies, Student Housing, Student Affairs, Campus Planning, Design and Construction Management, Capital Planning, Real Estate Services and Financial Operations and Administration.
2016	(June) Walking tours and "amenitizing" workshop with Mithun.
2016	(October) Second "amenitizing" workshop with Mithun.
2017	(May) Publication of the Orchard Park Priorities Plan.
2017	(June) Submittals in response to the Stage 1 Request for Proposals due.
2017	(August) Submittals in response to the Stage 2 Request for Proposal due.
2017	(September) Selection of University Student Living to enter into exclusive negotiations.
2017	(December) Demolition of current Orchard Park structure.

# APPENDIX B. ORCHARD PARK PROJECT PRIORITIES PLAN

The following table appears on the Student Housing Redevelopment website with different formatting.

	Request			Refer
	for		Ground	to
<b>Priorities</b>	Proposal	Interview	Lease	PAC
Affordability				
2. Long term capital and operational investment plan for Orchard Park.	$\boxtimes$	$\boxtimes$	$\boxtimes$	
3. Long term rent structure to ensure continued affordability elements for the project.	$\boxtimes$	$\boxtimes$	$\boxtimes$	
5. Establish long term rental and operating cost escalation plan with reasonable and market driven escalations.		$\boxtimes$	$\boxtimes$	
13. Identify affordable security deposit options and alternatives.		$\boxtimes$	$\boxtimes$	
Property Management/Customer S	Service			
2. Long term capital and operational investment plan for Orchard Park.	$\boxtimes$	$\boxtimes$	$\boxtimes$	
3. Long term rent structure to ensure continued affordability elements for the project.	$\boxtimes$	$\boxtimes$	$\boxtimes$	
5. Establish long term rental and operating cost escalation plan with reasonable and market driven escalations.		$\boxtimes$	$\boxtimes$	
6. Property management plan including, resourcing, location and personnel counts.		$\boxtimes$		
8. Define the process for maintaining high customer service to residents, including the prompt addressing of resident complaints.		$\boxtimes$		
11. Create a plan for best-in-class property management and associated performance metrics.		$\boxtimes$		
12. Annual evaluation of the property management services by UC Davis Student Housing.			$\boxtimes$	
Community Building				
4. Ensure the prioritization of families in the lease awarding process		$\boxtimes$	$\boxtimes$	
(i.e., make sure that it is families living in family housing)				
7. Define operating relationship and programming requirements between residents, P3 property manager, and UC Davis Student Housing		$\boxtimes$	$\boxtimes$	
9. Confirm applicant eligibility for family housing.			$\boxtimes$	
10. Establish a plan and criteria for fair and equitable distribution of below-market rental units	$\boxtimes$	$\boxtimes$	$\boxtimes$	
14. Transition plan for current Solano Park residents to new project			$\boxtimes$	
Additional Items				
1. Long-term capital and operational investment plan for existing P3 apartment project to ensure long-term functionality of project	NO longer annicanie			
15. Transition plan for non-family lessees at existing P3 project	No longer applicable.			
New Item. State our values in terms of layout for the land.	$\boxtimes$			
New Item. Bike-friendly statement.	$\boxtimes$			
New Item. Parking management and ownership.			$\boxtimes$	
New item. Flexible lease end dates.		$\boxtimes$		

