

# BREAKING GROUND ON WORKFORCE HOUSING CONFERENCE

**Opportunities for School Districts**  
**College of San Mateo**



*Friday, October 14th, 2016*  
*Conference Sessions 9am - 3:30pm*  
*Technical Assistance and Happy Hour to follow*

**Providing school districts with the resources they need to  
create long-term housing solutions for teachers and staff**

*Sponsored by:*



# Schedule

8:30am

## Registration and breakfast

9:00am

## Housing Leadership Day Welcome and Plenary

**Warren Slocum**, President and Supervisor | San Mateo County Board of Supervisors  
**Carolina Reid**, Assistant Professor of City and Regional Planning | UC Berkeley

10:10am

## Building Connections - Networking with City Staff

10:50am

## Breaking Ground Welcome and Orientation

**Anne Campbell**, Superintendent of Schools | San Mateo County Office of Education  
**Vu-Bang Nguyen**, Program Officer | Silicon Valley Community Foundation

11:00am

## Session 1: The Scope of the Challenge and What Can Be Done

**Jeff Vincent**, Deputy Director and Founder | Center for Cities + Schools at UC Berkeley  
**Josh Abrams**, Principal | Baird + Driskell Community Planning

11:30am

## Session 2: From Concept to Groundbreaking: Finance, Construction and Managing Affordable Housing

The subject of workforce housing can feel overwhelming at first. This session will provide an overview of the process from beginning to end, and cover various models available to school districts including ownership and rental options.

**Bruce Dorfman**, Senior Managing Director | Trammell Crow Residential  
**Andy Madeira**, Senior Vice President of Real Estate Development | Eden Housing  
**Armando Sanchez**, Executive Director | Housing Endowment and Regional Trust of San Mateo County (HEART)

12:30pm

## Lunch/Case Studies

There are important lessons to be learned from our neighbors. We will hear from school districts and researchers who have built, or tried to build, educational workforce housing. Presenters will share their lessons learned from Alameda, Santa Clara, and San Mateo Counties.

**Lindsay Maple and Leslie Valencia**, PLUS Fellows | Center for Cities + Schools at UC Berkeley  
**Wendy Gudalewicz**, Superintendent | Cupertino Union School District  
**Stanley Rose**, Superintendent, **Mark Allgire**, Assistant Superintendent and **Larry Adams**, Director Bonds Projects | Santa Clara Unified School District  
**Barbara Christensen**, former Director of Community/Government Relations | San Mateo County Community College District

2:00pm

## Session 3: Talking About Housing/Understanding Employee Needs

Two essential skills for school districts interested in workforce housing are understanding what their employees want and explaining their vision to the community. This session will focus on skill building in these areas. The first half will discuss how to make a compelling case that housing matters. The second half will cover focus groups and surveys.

**Sarah Seward**, Art Director | Circle Point  
**Kym Dorman**, Associate Principal and Chief Operating Officer | Raimi + Associates

2:55pm

## Session 4: Legal, Tax and Zoning Issues

There are many legal questions involved in planning and building workforce housing. The Office of the County Counsel will discuss a variety of topics including information on fees, the approval process, taxes and zoning.

**Adam Ely**, Deputy County Counsel | San Mateo County Office of the County Counsel  
**John Nibbelin**, Chief Deputy County Counsel | San Mateo County Office of the County Counsel

# Speakers

**Larry Adams** has worked in the construction industry for over thirty years with experience in contractor and owner organizations in both the private and public sectors. He has participated in developing and implementing six general obligation bond programs in two California school districts. He joined the Santa Clara Unified School District in 1997 and has been responsible for modernization and new construction projects with budgets of approximately \$900 million. For more information contact Larry at [ladams@scusd.net](mailto:ladams@scusd.net).

**Mark Allgire** CPA, is the Assistant Superintendent, Business Services of the Santa Clara Unified School District. Mark has worked in the school business arena since December 1981 and has been with SCUSD since December 2013. For more information, contact Mark at [mallgire@scusd.net](mailto:mallgire@scusd.net).

**Barbara Christensen** is the former Director of Community/Government Relations for the San Mateo County Community College District. She was the project manager for College Vista and Canada Vista which were constructed in 2002 and 2010 respectively. She is currently a consultant to the College District on its third housing project — as yet unnamed — which will be built at Skyline College. For more information contact Barbara at [christensen@smccd.edu](mailto:christensen@smccd.edu).

**Bruce Dorfman** currently serves as Senior Managing Director for Trammell Crow Residential's Northern California Division, a developer of high-density, mixed-use properties in core Bay Area locations. He is also a co-founder of Education Housing Partners, Inc. a California non-profit, public benefit corporation that exclusively focuses on the development of workforce housing for public school districts and agencies. EHP has been on the forefront of building workforce housing since being selected by the Santa Clara Unified School District in 2000 as the design/build developer of the award winning Casa del Maestro community. For more information visit [thompsondorfman.com/education-housing](http://thompsondorfman.com/education-housing) or contact Bruce at [bdorfman@tcr.com](mailto:bdorfman@tcr.com).

**Kym Dorman** is a leading social sector consultant who excels at conducting needs assessments, evaluations, and developing planning processes for complex community efforts that emphasize organizational and community capacity. With more than 15 years of experience as an applied researcher and facilitator, Kym's professional expertise spans a range of issues, including community development and early childhood education. She is skilled in a wide range of qualitative and quantitative research methods, and has considerable experience using research and data to help foundations, community coalitions, and organizations make informed decisions for their future. She is also fluent in Spanish. For more information contact Kym at [kym@raimiassociates.com](mailto:kym@raimiassociates.com).

**Adam Ely** is a member of the County Counsel workforce housing, construction, schools, special education, and litigation teams. As a Deputy County Counsel, Adam provides direct legal services to various County departments including the Sheriff's Office and Children and Family Services. Adam's experience includes school facilities construction work with several local districts and government facilities construction work with the County. He currently represents the Belmont Redwood Shores SD, Cabrillo Unified SD, San Carlos SD, and San Mateo Union High SD. Adam resides in Foster City with his wife (an elementary school teacher) and their two very active children. For more information contact Adam at [aely@smcgov.org](mailto:aely@smcgov.org).

**Wendy Gudalewicz**, PhD is Superintendent of the Cupertino Union School District, which serves 19,200 students. She has 29 years of experience in the education field including serving as the Chief Academic Officer for New Haven Unified School District, the Network Executive Officer (Area Superintendent) for the Oakland Unified School District, and as a school site administrator in several school districts in Santa Clara County. She was honored in 2011 as the Curriculum and Instruction Administrator of the Year for the Association of California School Administrators Region 6. For more information contact Wendy at [gudalewicz\\_wendy@cusdk8.org](mailto:gudalewicz_wendy@cusdk8.org).

**Andy Madeira** is Senior Vice President of Real Estate Development of Eden Housing, an organization that builds and maintains high-quality, well-managed, service-enhanced affordable housing communities that meet the needs of lower income families, seniors, and persons with disabilities. He is responsible for leading Eden's strategic growth in affordable rental, acquisitions, preservation, and mixed income development as well as overseeing their project development team. Mr. Madeira has significant real estate lending and finance experience having spent six years at Fannie Mae working in asset management and origination. For more information visit [edenhousing.org](http://edenhousing.org) or contact Andy at [AMadeira@edenhousing.org](mailto:AMadeira@edenhousing.org).

Conference  
organized by  
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For more  
information or to  
discuss next steps  
for your School  
District contact  
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Brandi Campbell  
at [campbell@  
bdplanning.com](mailto:campbell@bdplanning.com).

# Speakers

**Lindsay Maple and Leslie Valencia** are second year master students at UC Berkeley's Goldman School of Public Policy and College of Environmental Design respectively. As PLUS Fellows with the Center for Cities + Schools, they worked with the Oakland Unified School District to identify viable policy options to address the impact of housing availability and affordability on teacher recruitment and retention. For more information contact Lindsay [lindsaymaple@berkeley.edu](mailto:lindsaymaple@berkeley.edu) or Leslie at [leslev@berkeley.edu](mailto:leslev@berkeley.edu).

**John Nibbelin** was promoted to the position of Chief Deputy County Counsel in 2011, and provides direct legal services to a number of San Mateo County departments, officials and agencies. John's experience includes school facilities construction work with the Sequoia Union High School District, Bayshore Elementary School District, Las Lomas Elementary School District, and South San Francisco School District. John is presently working with various of the County Counsel's school clients in connection with workforce housing issues. For more information contact John at [jnibbelin@smcgov.org](mailto:jnibbelin@smcgov.org).

**Stanley Rose**, PhD has been Superintendent of the Santa Clara Unified School District for 14 years after serving for 7 years with the San Benito High School District. He is currently implementing the State's Labor Management Initiative throughout the District, a communications system designed to improve student outcomes in school, as well as working with Equal Opportunity Schools to increase the participation of Black and Latino students in Advance Placement classes. For more information, contact Stanley at [srose@scusd.net](mailto:srose@scusd.net).

**Armando Sanchez** is the Executive Director of the Housing Endowment and Regional Trust of San Mateo County (HEART), which is dedicated to increasing the supply of affordable housing by providing financing for the construction of new housing and offering first-time homebuyer loans. Prior to joining HEART, Mr. Sanchez worked for 20 years as a management consultant for nonprofit agencies and as a redevelopment consultant for cities. His work with cities included conducting financial analysis and preparing pro forma budgets for development projects, negotiating the acquisition and disposition of properties and managing residential development projects. For more information visit [heartofsmc.org](http://heartofsmc.org) or contact Armando at [asanchez@heartofsmc.org](mailto:asanchez@heartofsmc.org).

**Sarah Seward** is an Art Director at Circle Point, a firm that has been a guiding force in helping government agencies, businesses, and the public work collectively, think strategically, and communicate effectively for almost 30 years. Driven by passion and optimism to design for the greater good, Sarah enjoys working with folks who get excited about the big picture. Her skills include branding and identity development, print, web and interactive design, illustration and information design. For more information visit [circlepoint.com](http://circlepoint.com) or contact Sarah at [seward@circlepoint.com](mailto:seward@circlepoint.com).

**Jeff Vincent**, PhD is Deputy Director and Co-Founder of the Center for Cities + Schools (CC+S) at the University of California, Berkeley. CC+S is a policy research and technical assistance center that promotes high quality education as an essential component of urban and metropolitan vitality to create equitable, healthy, and sustainable cities and schools for all. His policy and research interests lie at the intersection of land use planning, community development, and educational improvement, with a focus on how schools serve as educational and neighborhood assets. For more information visit [citiesandschools.berkeley.edu](http://citiesandschools.berkeley.edu) or contact Jeff at [jvincent@berkeley.edu](mailto:jvincent@berkeley.edu).

*For presentations,  
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Breaking Ground  
Conference, visit:*

**21.elements.com/  
teacherhousing**

## Conference Advisory Committee

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Eden Housing | [Nathan Ho](mailto:Nathan Ho) & [Andrea Osgood](mailto:Andrea Osgood)  
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HEART | [Armando Sanchez](mailto:Armando Sanchez)  
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