AGENDA  
SAN MATEO COUNTY COMMUNITY COLLEGE DISTRICT  
STUDY SESSION OF THE BOARD OF TRUSTEES  
October 13, 2021  
Closed Session at 5:00 p.m.; Open Session at 6:00 p.m.  

In Person at 3401 CSM Drive, San Mateo, CA 94402

Members of the Public may also participate via Zoom.  
Zoom Meeting ID – https://smccd.zoom.us/j/88517418668  

NOTICE ABOUT PUBLIC PARTICIPATION AT BOARD MEETINGS

Observing the Meeting
Members of the public who wish to observe the meeting in-person or remotely by accessing the link or calling the following telephone number above at the beginning of the meeting.

For individuals who attend the meeting in person, face coverings will be required while in-doors at the District Office for all individuals, regardless of COVID-19 vaccination status.

Providing Public Comment During the Meeting on NON-AGENDA Items
To make a comment regarding a non-agenda item, members of the public:

(1) If in person, may seek recognition at the speaker’s lectern when called upon by the Board President, or

(2) If remote, once in the Zoom meeting (via above link), can utilize the “raise hand” function on the bottom right corner of the screen. This will allow for the Board President to recognize members for comment and will allow staff to activate audio access to individual participants. Members of the public who “raise their hand” will be called upon in the order they appear.

(3) Members of the public making comment are reminded of the 3-minute time limit for comment.

Providing Public Comment During the Meeting on AGENDA Items
To make a comment regarding an item on the agenda, members of the public:

(1) If in person, may seek recognition at the speaker’s lectern when called upon by the Board President, or

(2) If remote, once in the Zoom meeting (via above link), can utilize the “raise hand” function on the bottom right corner of the screen. This will allow for the Board President to recognize members for comment and will allow staff to activate audio access to individual participants. Members of the public who “raise their hand” will be called upon in the order they appear.

(3) Members of the public making comment are reminded of the 3-minute time limit for comment.

Accommodations
Persons with disabilities who require an accommodation or service should contact the Chancellor’s Office at (650) 358-6877 at least 24 hours prior to the Board meeting.

5:00 p.m. Call to Order

CLOSED SESSION ITEMS FOR DISCUSSION

1. Conference with Legal Counsel – Anticipated Litigation: Significant exposure to litigation pursuant to Gov. Code, § 54956.9, subd. (d)(2): One Case

PUBLIC COMMENTS ON CLOSED SESSION ITEMS ONLY

RECESS TO CLOSED SESSION
MEETING AGENDA

RECONVENE TO OPEN SESSION

6:00 p.m.  Call to Order / Roll Call / Pledge of Allegiance

CONSIDERATION OF RESOLUTION REGARDING BROWN ACT MEETING REQUIREMENTS

21-10-101B  Adoption of Resolution No. 21-08 to Make Findings Allowing Continued Remote Meetings Under Brown Act (*Time Allotted: 5 minutes*)

ANNOUNCEMENT OF REPORTABLE ACTION TAKEN IN CLOSED SESSION

DISCUSSION OF THE ORDER OF THE AGENDA

MINUTES

21-10-01  Approval of the Minutes of the September 22, 2021 Study Session

STATEMENTS FROM THE PUBLIC ON NON-AGENDA ITEMS

NEW BUSINESS

21-10-01A  Approval of Personnel Items: Changes in Assignment, Compensation, Placement, Leaves, Staff Allocations and Classification of Academic and Classified Personnel (*Time Allotted: 5 minutes*)

STUDY SESSION

21-10-01C  Update on Student Success Link Implementation (*Time Allotted: 60 minutes*)

21-10-02C  Discussion of Potential Next Steps in Developing Student Housing (*Time Allotted: 75 minutes*)

COMMUNICATIONS

STATEMENTS FROM BOARD MEMBERS

RECONVENE TO CLOSED SESSION (if necessary)

RECONVENE TO OPEN SESSION (if necessary)

ANNOUNCEMENT OF REPORTABLE ACTION TAKEN IN CLOSED SESSION (if necessary)

ADJOURNMENT
BOARDS REPORT NO. 21-10-101B

TO: Members of the Board of Trustees

FROM: Michael Claire, Chancellor

PREPARED BY: Mitchell Bailey, Vice Chancellor/Chief of Staff

ADOPTION OF RESOLUTION NO. 21-08 TO MAKE FINDINGS ALLOWING CONTINUED REMOTE MEETINGS UNDER BROWN ACT

On June 11, 2021, Governor Newsom issued Executive Order N-08-21, which rescinded his prior Executive Order N-29-20 and set a date of October 1, 2021 for public agencies to transition back to public meetings held in full compliance with the Brown Act. The original Executive Order provided that all provisions of the Brown Act that required the physical presence of members or other personnel as a condition of participation or as a quorum for a public meeting were waived for public health reasons. If these waivers fully sunsetted on October 1, 2021, legislative bodies subject to the Brown Act would have to contend with a sudden return to full compliance with in-person meeting requirements as they existed prior to March 2020, including the requirement for full physical public access to all teleconference locations from which board members were participating.

On September 16, 2021, the Governor signed AB 361, a bill that formalizes and modifies the teleconference procedures implemented by California public agencies in response to the Governor’s Executive Orders addressing Brown Act compliance during shelter-in-place periods. AB 361 allows a local agency to continue to use teleconferencing under the same basic rules as provided in the Executive Orders when certain circumstances occur or when certain findings have been made and adopted by the local agency.

AB 361 also requires that, if the state of emergency remains active for more than 30 days, the agency must make findings by majority vote every 30 days to continue using the bill’s exemption to the Brown Act teleconferencing rules. The findings are to the effect that the need for teleconferencing persists due to the nature of the ongoing public health emergency and the social distancing recommendations of local public health officials. Effectively, this means that local agencies must agendize a Brown Act meeting once every thirty days to make findings regarding the circumstances of the emergency and to vote to continue relying upon the law’s provision for teleconference procedures in lieu of in-person meetings.

AB 361 provides that Brown Act legislative bodies must return to in-person meetings on October 1, 2021, unless they choose to continue with fully teleconferenced meetings because a specific declaration of a state or local health emergency is appropriately made. AB 361 allows local governments to continue to conduct virtual meetings as long as there is a gubernatorially-proclaimed public emergency in combination with (1) local health official recommendations for social distancing or (2) adopted findings that meeting in person would present risks to health. AB 361 is effective immediately as urgency legislation and will sunset on January 1, 2024.

Because local rates of transmission of COVID-19 are still in the “substantial” tier as measured by the Centers for Disease Control, it is recommended that the Board avail itself of the provisions of AB 361 allowing continuation of online meetings by adopting findings to the effect that conducting in-person
meetings would present an imminent risk to the health and safety of attendees. A resolution to that effect, and directing staff to return each 30 days with the opportunity to renew such findings, is attached hereto.

RECOMMENDATION

It is recommended that the Board of Trustees adopt Resolution No. 21-0x finding that, as a result of the continuing COVID-19 pandemic state of emergency declared by Governor Newsom, meeting in person would present imminent risks to the health or safety of attendees.
RESOLUTION NO. 21-08

BY THE GOVERNING BOARD OF THE
SAN MATEO COUNTY COMMUNITY COLLEGE DISTRICT
STATE OF CALIFORNIA

RESOLUTION FINDING THAT, AS A RESULT OF THE CONTINUING COVID-19 PANDEMIC STATE OF EMERGENCY DECLARED BY GOVERNOR NEWSOM, MEETING IN PERSON FOR MEETINGS OF THE SAN MATEO COUNTY COMMUNITY COLLEGE DISTRICT BOARD OF TRUSTEES WOULD PRESENT IMMINENT RISKS TO THE HEALTH OR SAFETY OF ATTENDEES

WHEREAS, on March 4, 2020, the Governor proclaimed pursuant to his authority under the California Emergency Services Act, California Government Code section 8625, that a state of emergency exists with regard to a novel coronavirus (a disease now known as COVID-19); and

WHEREAS, on June 4, 2021, the Governor clarified that the “reopening” of California on June 15, 2021 did not include any change to the proclaimed state of emergency or the powers exercised thereunder, and as of the date of this Resolution, neither the Governor nor the Legislature have exercised their respective powers pursuant to California Government Code section 8629 to lift the state of emergency either by proclamation or by concurrent resolution in the state Legislature; and

WHEREAS, on March 17, 2020, Governor Newsom issued Executive Order N-29-20 that suspended the teleconferencing rules set forth in the California Open Meeting law, Government Code section 54950 et seq. (the “Brown Act”), provided certain requirements were met and followed; and

WHEREAS, on September 16, 2021, Governor Newsom signed AB 361 that provides that a legislative body subject to the Brown Act may continue to meet without fully complying with the teleconferencing rules in the Brown Act provided the legislative body determines that meeting in person would present imminent risks to the health or safety of attendees, and further requires that certain findings be made by the legislative body every thirty (30) days; and

WHEREAS, California Department of Public Health (“CDPH”) and the federal Centers for Disease Control and Prevention (“CDC”) caution that the Delta variant of COVID-19, currently the dominant strain of COVID-19 in the country, is more transmissible than prior variants of the virus, may cause more severe illness, and that even fully vaccinated individuals can spread the virus to others resulting in rapid and alarming rates of COVID-19 cases and hospitalizations (https://www.cdc.gov/coronavirus/2019-ncov/variants/delta-variant.html); and

WHEREAS, the CDC has established a “Community Transmission” metric with 4 tiers designed to reflect a community’s COVID-19 case rate and percent positivity; and

WHEREAS, the County of San Mateo currently has a Community Transmission metric of “substantial” which is the second most serious of the tiers; and

WHEREAS, the Board of Trustees has an important governmental interest in protecting the health, safety and welfare of those who participate in its meetings; and

WHEREAS, in the interest of public health and safety, as affected by the emergency caused by the spread of COVID-19, the Board of Trustees deems it necessary to find that meeting in person would present
imminent risks to the health or safety of attendees, and thus intends to invoke the provisions of AB 361 related to teleconferencing;

NOW, THEREFORE, BE IT RESOLVED THAT:

1. The recitals set forth above are true and correct.

2. The Board of Trustees finds that meeting in person would present imminent risks to the health or safety of attendees.

3. Staff is directed to return no later than thirty (30) days after the adoption of this resolution with an item for the Board to consider making the findings required by AB 361 in order to continue meeting under its provisions.

4. Staff is directed to take such other necessary or appropriate actions to implement the intent and purposes of this resolution.

REGULARLY PASSED AND ADOPTED this 13th day of October 2021.

Ayes:

Noes:

Abstenions:

Attest: ________________________________

Richard Holober, Vice President-Clerk
Board of Trustees
CONVENE TO OPEN SESSION

The Board convened to Open Session at 6:04 p.m.

Board Members Present: President Thomas A. Nuris, Vice President Richard Holober, Trustee Maurice Goodman, Trustee Lisa Petrides, Trustee John Pimentel, Student Trustee Ashley Garcia

Others Present: Chancellor Michael Claire, Executive Vice Chancellor Richard Storti, Skyline College President Melissa Moreno, College of San Mateo President Jennifer Taylor-Mendoza, Cañada College Interim President Kim Lopez, District Academic Senate President Kate Williams Browne

DISCUSSION OF THE ORDER OF THE AGENDA
(Time Stamp: 1:05:05)

President Nuris stated there are no changes or edits to the agenda.

Approval of the Minutes of the August 25, 2021 Regular Meeting (21-08-03)
(Time Stamp: 1:05:17)

Motion to Approve by: Trustee Goodman

Second by: Trustee Petrides

Action: Approved unanimously, with all Trustees voting Aye.

Summary of Edits or Corrections: None.

Approval of the Minutes of the September 9, 2021 Regular Meeting (21-08-04)
(Time Stamp: 1:05:48)

Motion to Approve by: Trustee Petrides

Second by: Vice President Holober

Action: Approved unanimously, as amended, with all Trustees voting Aye.

Summary of Edits or Corrections: Vice President Holober requested that his comments relating to the District having a 30% beginning reserve and that a 15% of budget reserve position has been adopted by the Board and that he would like to see those excess reserves go to fund other District priorities such as Free Community College and increasing the number of full-time faculty and reducing the dependence on part-time faculty.
STATEMENTS FROM THE PUBLIC ON NON-AGENDA ITEMS
(Time Stamp: 1:07:26)

- District Academic Senate President Browne commented on the state bill allowing for the continuation of virtual meetings and the recent Districtwide briefing on the return to campus and student vaccine policy.

- Annette Perot spoke about the COVID-19 Supplemental Paid Sick Leave (SP-95).

NEW BUSINESS

Approval of Personnel Items: Changes in Assignment, Compensation, Placement, Leaves, Staff Allocations and Classification of Academic and Classified Personnel (21-09-02A)
(Time Stamp: 1:10:41)

Motion to Approve by: Vice President Holober
Second by: Trustee Goodman
Action: Approved unanimously, with all Trustees voting Aye.
Summary of Discussion: None.
Public Comment: None.

STUDY SESSION

District Anti-Racism Council Update (21-09-05C)
(Time Stamp: 1:11:24)

Members of the District’s Anti-Racism Council engaged the Board in a discussion about work being undertaken by the Council to make the District a fair, welcoming, just and equitable institution. In their conversation, Council members explored an understanding of race and racism and how it has manifested itself broadly and locally, and noted the need to challenge our individual and collective understanding of how things came to be.

The Council and Board also discussed the need for accountability, noting the importance of self-criticality and self-examination. The Council outlined mission, vision and values statements and the structure of the working groups of the Council. The need to examine District policies and procedures through an Anti-Racist lens was discussed because, as constructed, they often have a disproportionate impact on marginalized students.

The Board expressed unanimous support for the work of the Council and asked that professional development opportunities be made available to the Board to educate and coach Trustees on matters of Anti-Racism and equity.

On behalf of the Board, President Nuris thanked the presenters for their outstanding presentation and rich discussion about such critical matters. He asked that regular engagement continue with the Board on policy and personal levels.
COMMUNICATIONS
(Time Stamp: 3:49:20)

Chancellor Claire mentioned the Board had received an email from a resident asking about the fall and spring semesters and he responded on the Board’s behalf.

STATEMENTS FROM BOARD MEMBERS
(Time Stamp: 3:49:45)

President Nuris: Welcomed new Executive Vice Chancellor Richard Storti, Executive Assistant to the Chancellor and Board Candice Bell, and Interim Chief of Human Resources Marie Billie.

Vice President Holober: None.

Trustee Goodman: None.

Trustee Petrides: None.

Trustee Pimentel: He asked if the enrollment numbers that Jennifer Carson inquired about will be provided to the public.

Student Trustee Garcia: None.

ADJOURNMENT

Meeting adjourned at 8:51 p.m.

Submitted by

Michael Claire, Secretary
BOARD REPORT NO. 21-10-01A

TO: Members of the Board of Trustees
FROM: Michael Claire, Chancellor
PREPARED BY: Marie Billie, Interim Chief Human Resources Officer
David Feune, Director, Human Resources

APPROVAL OF PERSONNEL ITEMS

New employment; changes in assignment, compensation, and placement; leaves of absence; changes in staff allocation and classification of academic and classified personnel; retirements, phase-in retirements, and resignations; equivalence of minimum qualifications for academic positions; and short-term temporary classified positions.

A. ADMINISTRATIVE APPOINTMENT, REAPPOINTMENT, ASSIGNMENT AND REASSIGNMENT

College of San Mateo

Ji Yuon Chung
Acting College Business Officer
Administrative Services

Reassigned from Business Operations Analyst (Grade 195S of the Classified Professional-Supervisory Salary Schedule 40; Salary Range: $93,588 - $119,520) into this acting classified exempt supervisory role (Grade 192E of Academic-Classified Exempt Supervisory Schedule 35; Salary Range: $122,688 - $155,388), effective October 14, 2021, replacing Ludmila Prisecar who is reassigned.

District Office

Ana Pulido*
Interim Director of Public Affairs
Chancellor’s Office

New interim classified supervisory (exempt) employment (Grade 195E of the Academic-Classified Exempt Supervisory Salary Schedule 35; Salary Range: $149,112- $188,856), effective November 1, 2021, replacing Richard Rojo.

B. PUBLIC EMPLOYMENT

District Office

Aira Hipolito*
Program Services Coordinator – Degree Audit
Educational Services and Planning

New full-time, 12-month classified employment (Grade 27 of the Classified Salary Schedule 60; Salary Range: $68,580 - $87,504), effective October 25, 2021, replacing Deborah Laulusa who was reassigned.
Skyline College

Kaung Naing*  
Office Assistant II  
(Assessment/Counseling)

New full-time, 12-month classified employment (Grade 18 of the Classified Salary Schedule 60; Salary Range: $55,104 - $70,248), effective October 14, 2021, replacing Ursula Racca who resigned.

Tammy Wong*  
Program Services Coordinator – STEM  
Science/Math/Technology

New full-time, 12-month classified employment (Grade 27 of the Classified Salary Schedule 60; Salary Range: $68,580 - $87,504), effective October 14, 2021, replacing Alyssa Wong-Conway who resigned.

1. Re-Employment

C. REASSIGNMENT THROUGH THE HIRING PROCESS

None

D. TRANSFER/ADMINISTRATIVE REASSIGNMENT

College of San Mateo

Jose Cartagena  
Office Assistant II  
Counseling

Transferred from a part-time (48%) Office Assistant II (Grade 18 of the Classified Salary Schedule 60; Salary Range: $55,104 - $70,248) at Skyline College into this full-time 12-month position at College of San Mateo at the same grade of the same salary schedule, effective October 18, 2021, replacing Maira Delgado Laurens who resigned.

E. NON-REPRESENTED EMPLOYEES ADDITIONAL DUTIES ASSIGNMENT

District Office

Peter Fitzsimmons  
District Budget Officer  
Business Services

Per Administrative Procedure 5.01.1, a non-represented employee assigned additional duties that are impacting several areas in the college and/or the District Office shall receive an additional responsibilities pay equal to 10% of the employee’s base salary. Recommend the approval of additional responsibilities pay in the amount of $1,652.60 per month, effective January 1, 2021 through September 30, 2021.

Nicole Wang  
Controller  
Business Services

Per Administrative Procedure 5.01.1, a non-represented employee assigned additional duties that are impacting several areas in the college and/or the District Office shall receive an additional responsibilities pay equal to 10% of the employee’s base salary. Recommend the approval of additional responsibilities pay in the amount of $1,557.90 per month, effective January 1, 2021 through September 30, 2021.
Nettie Wong  Payroll Manager/ Compliance Officer  Business Services

Per Administrative Procedure 5.01.1, a non-represented employee assigned additional duties that are impacting several areas in the college and/or the District Office shall receive an additional responsibilities pay equal to 10% of the employee’s base salary. Recommend the approval of additional responsibilities pay in the amount of $1,294.90 per month, effective October 1, 2021 through December 31, 2021.

Jessica Esclamado  Human Resources Representative  Human Resources

Per Administrative Procedure 5.01.1, a non-represented employee assigned additional duties that are impacting several areas in the college and/or the District Office shall receive an additional responsibilities pay equal to 5% of the employee’s base salary. Recommend the approval of additional responsibilities pay in the amount of $398.40 per month, effective October 1, 2021 through December 31, 2021.

F. CHANGES IN STAFF ALLOCATION

**College of San Mateo**

1. Recommend a change in staff allocation to add one full-time, 12-month Staff Assistant position (Grade 21 of the Classified Salary Schedule 60; Salary Range: $59,112 - $75,552) in the Community Relations & Marketing/President’s Office, effective October 14, 2021.

**Skyline College**


G. PHASE-IN RETIREMENT

None

G. LEAVE OF ABSENCE

None

H. PUBLIC EMPLOYEE RETIREMENT AND RESIGNATION

1. Retirement

None

2. Post-Retirement

None
3. Resignation

**College of San Mateo**

**Jessica Damian**  
Program Services Coordinator (HSI STEM)  
Math and Science

Resignation effective September 30, 2021, with 3 years of District service.

**Mary Vogt**  
Administrative Assistant  
Planning, Research, Innovation and Effectiveness

Resignation effective October 8, 2021, with 6 years of District service.

I. ESTABLISHMENT OF EQUIVALENCY TO MINIMUM QUALIFICATIONS

None

J. PROFESSIONAL EXPERT/CONTRACT POSITIONS

<table>
<thead>
<tr>
<th>Location</th>
<th>Division / Department</th>
<th>No. of Pos.</th>
<th>Start and End Date</th>
<th>Services to be performed</th>
</tr>
</thead>
</table>
| Cañada College    | Financial Aid         | 1           | 10/14/2021 - 03/31/2022 | Consultant (Non-Instructional):  
                  |                       |             |                    | Duties include: 1) Creating a comprehensive Financial Aid online manual for all the processes that are done in Banner, review technical processes for inefficiencies and work with staff and Director to streamline processes.  
                  |                       |             |                    | 2) Banner/Financial Aid expert will review our current processes and look for ways to automate and move the FA processes online. This will provide the FA staff with online access to training manuals and support them during offsite work. Requesting Manager: Wissem Bennani |

K. SHORT-TERM, NON-CONTINUING POSITIONS

<table>
<thead>
<tr>
<th>Location</th>
<th>Division / Department</th>
<th>No. of Pos.</th>
<th>Start and End Date</th>
<th>Services to be performed</th>
</tr>
</thead>
</table>
| District Office  | Chancellor’s Office    | 3           | 10/14/2021 - 04/30/2022 | Program Specialist:  
                  |                       |             |                    | Three positions are needed (one stationed at each campus) to conduct and support the student vaccination attestation and onsite |
| unvaccinated COVID-19 testing procedures and protocols. Individuals will hold knowledge and applicable skills in the medical field to demonstrate comfort and proficiency with technology application platforms. Duties will included navigation, review and follow up of submitted student attestation information; communication with students and college personnel regarding various vaccination attestation elements. Requesting Manager: Ray Hernandez |
UPDATE ON THE STUDENT SUCCESS LINK (SSL) IMPLEMENTATION

An update to the implementation of the Student Success Link (SSL), i.e. Salesforce CRM, will be presented to the Board of Trustees. The Board will receive a brief presentation showcasing components that have been implemented to date, as well as what is on the horizon for future components to be implemented through the Project Prioritization process. Time for discussion, questions and comments will be allocated at the end of the presentation.

A comprehensive report is attached for review.
THE STUDENT SUCCESS LINK (SSL)
THE SYSTEM OF ENGAGEMENT FOR THE SAN MATEO COUNTY COMMUNITY COLLEGE DISTRICT

EXECUTIVE SUMMARY

The San Mateo County Community College District (SMCCCD), and its three colleges, Cañada College, College of San Mateo, and Skyline College began implementing a Constituent Relationship Management (CRM) system following an extensive Request for Proposals (RFP) process and Board of Trustees approval in December 2018. In consultation with implementation partners Enrollment Rx and APEXIT, a multitude of campus constituents have been part of building out a System of Engagement on the Salesforce CRM platform, appropriately named through employee and student feedback, *The Student Success Link (SSL)*.

Utilizing principles from Agile (Iterative) Project Management, the various phases of SSL implementation focus on the outcomes of improving operational efficiency, expanding the use of data for those working directly with students, and providing a technological system that is easy to use for both students and employees. Roughly a quarter of the way through this *multi-year, multi-phase implementation*, the Student Success Link continues to build upon these principles in supporting SMCCCD to meet its strategic goals.

METHODOLOGY

During the onset of the project, initial phases of implementation were developed to align with the student lifecycle starting with recruitment and admissions, moving through matriculation and retention, and culminating with completion and transfer/workforce. Through a series of more than fifty “road show” presentations discussing the capabilities of the CRM system, project plans were developed to lead up to the initial configuration and launch.

Each phase went through a series of steps as part of the implementation in a true iterative fashion, including:

1) **Discovery**: Business Process Analysis (BPA) and Mapping
   - Unit Leaders from the three colleges discuss their business processes including areas of strengths and opportunities, sticking points, their vision for SSL utilization, and data and reporting to support the Unit.
   - Utilizing the snowball method of research, Unit Leaders then bring additional folks into the conversation to build upon and validate the initial BPA and Mapping.
   - Project Plan creation utilizing the Smartsheet project management platform.

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1 SMCCCD Board of Trustees Meeting Minutes from December 12, 2018
2) **Data Validation**: Technical Data and Systemic Processes
   - ITS Staff and Unit Leaders engage in technical data mapping and validation.
   - Data and Process Clean-up Projects occur to ensure alignment with desired outcomes.

3) **System Configuration**: Out-of-the Box and Customizations
   - ITS Staff configures the system according to system capabilities and business unit desires.
   - Integration of data elements from third-party systems.

4) **Testing & Training**: System and Unit Level
   - System testing for technical automations and bi-directional integrations, when needed.
   - Unit testing and validation for data integrity and desired functionality.
   - End User Training of new functionality.

5) **Production Stabilization & Continuous Improvement**: It does not stop after implementation!
   - Monitoring of system functionality and data validation for stabilization.
   - Quarterly Continuous Improvement meetings with Units to look at reports, dashboard and metrics and discuss continuous improvement measures for future iterations.

**PHASES OF IMPLEMENTATION (THROUGH SUMMER 2021)**

The various phases of implementation include a variety of units, working together, across the district, to conceptualize a new approach to the student experience. Below is a list of the phases of implementation, including the employee groups that began utilizing the Student Success Link (SSL) in some fashion:

*Phase 0: International Programs* (Launched 2016, In Continuous Improvement)

- International Program Staff & Recruitment Agents
- *International Students*
  NOTE: International Programs launched a Salesforce CRM for their admissions, scholarships and homestay application in 2017 and are now in Continuous Improvement as they bring in additional functionality in working with students.

*Phase 1: Recruitment and Admissions* (Launched 2019, In Continuous Improvement)

- College Recruiters
- Recruitment Student Ambassadors
- Marketing Teams
- Admissions & Records Staff
- *Prospective Students*

*Phase 2: Enrollment and Matriculation* (Launched 2020, In Continuous Improvement)

- Success Navigators
- Financial Aid Teams
- Residency Specialists
- Assessment Centers
- New, First-Time and First-Time Transfer Students

**Phase 3: Counseling and Retention/Early Alert** (Launched 2021, In Stabilization & Continuous Improvement)

- Counseling Faculty (General & Program-Specific)
- Third Party Schedulers
- Program Support Staff
  - EOPS
  - CARE
  - CalWORKS
  - TRiO
  - Promise
  - MESA
  - Puente
  - Middle College
  - STEM
  - Veterans
  - College for Working Adults
  - Transcript Evaluation Services
  - Transfer Centers
  - Career Services
  - Sparkpoint
  - Multicultural & Dream Centers
  - English as a Second Language (ESL)
  - Project Change
  - Counseling Division Assistants

- Returning, Returning Transfer, Continuing and K-12 Students

**Phase 4: Grant/Categorical Programs/Additional Services** (Partial Launch 2021, In Stabilization; Others in Discovery)

**Phase 5: K-12 College Connections and Adult Education** (In Discovery)

**Phase 6: Articulation, Transcript Services, Graduation** (In Discovery)

**Phase 7: Workforce Development** (Not Started)

**Phase 8: Alumni Relations** (Not Started)
COMPONENTS OF THE STUDENT SUCCESS LINK (SSL)

Request for Information (RFI)
Forms: Located on the home page of all three colleges, prospective students can enter in basic contact information and an Area of Interest and receive automated marketing messages with the Call to Action of Apply for Admission.

Automated Marketing Messages: Created by Marketing Teams in consultation with business users, messages are designed to nudge students forward along a journey to complete a Call to Action, i.e. Applying to the College. Prospects/Students are automatically removed from a journey once the Call to Action has been completed or they end up on a To Do List to receive a call by the Unit. Examples include: Student Ambassadors following up when a prospect hasn’t completed an Admissions Application, a Success Navigator following up when a student hasn’t completed Orientation, or a Financial Aid Team Member calling a student when they haven’t completed a FAFSA or California Dream Act Application.
**Success Plans**: Created by Departments and Programs, Success Plans are a list of tasks the student either is required (or recommended) to complete in order to move forward in a process. Success Plan tasks can be completed automatically, by a Success Team Member manually, or by students within the Student Portal of SSL. Examples include: Cañada Enrollment Steps Success Plan, Skyline Exploratory Success Plan, and CSM Promise First-Semester Success Plan.

**Success Teams**: A group of employees, assigned automatically to a student through pre-programmed criteria or manually, to help support students and be a resource during their individual higher education journey. Examples include: Skyline EOPS Success Team, CSM Promise Support Team, and the Cañada Veterans & Military Connected Success Team.
Individual & Group Appointment Scheduling:
Appointments can be scheduled directly by students with members of their Success Team through their SSL portal, or by Third-Party Schedulers through Predefined Availability or as a One-Off Appointments. Appointment Confirmations and Reminders are sent to the student automatically and staff members can determine their individual notification preferences.

Microsoft Outlook Integration:
Calendars are bi-directionally synced between the SSL and Microsoft Outlook. Non-Student Meetings created in Outlook integrate over and block out appointment availability to avoid double-booking.
Drop-In Availability (Queue Management): Students can “Get into the Queue” to be seen with the next available staff member scheduled to work Drop-In, i.e. Non-Scheduled Appointments. The Drop-In Queue can be joined and managed virtually or In-person.

Event Scheduling: Created by Departments and Programs, events are built directly in the SSL, where students can RSVP and be sent reminder messages automatically. The events may (or may not) fulfill Success Plan tasks such as New Student Orientation or Academic Reinstatement Workshops as attendance is tracked in the SSL directly.
**Student Alerts:** Instructional Faculty submit an Early Alert in Canvas (Learning Management System) which integrates over to the SSL and is routed to a pre-programmed Support Team member. Support Team members can intervene and provide resources to the student directly. Future Alerts include Proactive Alerts which come from pre-defined criteria from the Admissions Application, Degree Progress Alerts which come from a student being off their Student Education Plan (SEP) in Degree Works, and Post-Term Alerts from end of term processing around Academic Standing.

**Case Notes:** Notes are added to a student record for other Success Team Members to read in their future interactions with the student. Notes can be shared “in the moment” by pinging another staff member to the note for more immediate follow-up and collaboration. Examples include when a counselor pings a Financial Aid Team member of a student having more complex questions about their FAFSA application.
**Assigned Tasks**: Tasks are created and assigned to students (or other staff members) for follow-up. Tasks show up for the student in the SSL so they can indicate when the task is complete and the staff member can be alerted. Examples include when a counselor encourages the student to meet with a faculty member or attend tutoring hours, they can assign the task to the student for them to follow-up.

**Reports**: Various data points are compiled into a report for program review and external reporting. Unit leaders can make staffing decisions or changes in the moment by accessing data such as number of available appointments for the upcoming week, or redirecting resources to follow-up with students during peak enrollment cycles.
Dashboards: Creating a visual display from underlying reports, staff members and Unit Leaders can see aggregate data displayed in various chart modalities for presentations, or in-the-moment decision making. Utilized in Continuous Improvement meetings to look at data such as conversion rates along the enrollment funnel, so that process changes can be tweaked to influence outcomes.

Chatbots: College website visitors can ask questions of the chatbot and get answers from a pre-developed Knowledge Base. Students authenticated into the SSL can get responses directly related to their student record such as “How much money will I get in my Financial Aid refund?”, or submit a support ticket to be answered by a support team member as either a “Questions Queue” or “Live Agent”.
Forms/Documentation Submission:
Forms/Documentation can be uploaded directly into the SSL by students and routed to the appropriate Team member for processing. The student can see the Status change of the form being processed so they know when it has been approved or if additional information is needed. Once processed, the form integrated over to Banner (Student Information System) as the system of record for the district.

METRICS RELATED TO BASELINE AND CONTINUOUS IMPROVEMENT

1) **Conversion Rates**: Request for Information (RFI) Submission (Inquiry) to Admitted by College

<table>
<thead>
<tr>
<th>RFI to Application (December 2019-September 2021)</th>
<th>Total RFIs</th>
<th>Total RFIs with Application</th>
</tr>
</thead>
<tbody>
<tr>
<td>Cañada College</td>
<td>676</td>
<td>131 (19%)</td>
</tr>
<tr>
<td>College of San Mateo</td>
<td>927</td>
<td>266 (28%)</td>
</tr>
<tr>
<td>Skyline College</td>
<td>2772</td>
<td>834 (30%)</td>
</tr>
<tr>
<td><strong>Total</strong></td>
<td><strong>4374</strong></td>
<td><strong>1231 (25%)</strong></td>
</tr>
</tbody>
</table>

2) **Conversion Rates**: Matriculation Step Completion (Enrollment Funnel)

2 Median Conversion Rates Nationally for First Time Students across Institution Type: 10%-26%.
### Matriculation Steps Fall 2021

<table>
<thead>
<tr>
<th></th>
<th>Total First Time Students in Fall 2021</th>
<th>Orientation Complete</th>
<th>Orientation + Assessment Complete</th>
<th>Orientation, Assessment, Counseling Complete (All Matriculation Steps)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Cañada College³</td>
<td>1957</td>
<td>551 (28%)</td>
<td>489 (25%)</td>
<td>389 (20%)</td>
</tr>
<tr>
<td>College of San Mateo</td>
<td>1657</td>
<td>1276 (77%)</td>
<td>1257 (76%)</td>
<td>1144 (69%)</td>
</tr>
<tr>
<td>Skyline College</td>
<td>1316</td>
<td>904 (69%)</td>
<td>889 (68%)</td>
<td>803 (61%)</td>
</tr>
<tr>
<td><strong>Total</strong></td>
<td><strong>4930</strong></td>
<td><strong>2731 (55%)</strong></td>
<td><strong>2625 (53%)</strong></td>
<td><strong>2336 (47%)⁴</strong></td>
</tr>
</tbody>
</table>

---

3) **Appointments**: Counseling Appointments and Status (March 2021-Spetember 2021)

<table>
<thead>
<tr>
<th>Appointment Status</th>
<th>Count</th>
</tr>
</thead>
<tbody>
<tr>
<td>Attending (Future Appointments)</td>
<td>3,630</td>
</tr>
<tr>
<td>Attended</td>
<td>16,946</td>
</tr>
<tr>
<td>Cancelled</td>
<td>3,892</td>
</tr>
<tr>
<td>No Show</td>
<td>2,609</td>
</tr>
<tr>
<td><strong>Total</strong></td>
<td><strong>27,077</strong></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Appointment Topic⁵</th>
<th>Count</th>
</tr>
</thead>
<tbody>
<tr>
<td>Academic</td>
<td>23,418</td>
</tr>
<tr>
<td>Career</td>
<td>923</td>
</tr>
<tr>
<td>Transfer</td>
<td>1,548</td>
</tr>
<tr>
<td>Assessments</td>
<td>86</td>
</tr>
</tbody>
</table>

¹ **National Statistics on Conversion and Matriculation Completion Rates.**

³ Cañada’s admissions rate is falsely inflated due to fraudulent applicants thereby impacting matriculation step completion rates.

⁴ Median Enrollment Completion Rates Nationally for First Time Students across Institution Type: 25%-32%

⁵ Topics and Subtopics were modified starting in Summer 2021 to include New & Returning Student Matriculation Counseling Appointments as well as further subsets of Subtopics.
CONTINUED IMPLEMENTATION (FALL 2021 AND BEYOND)

During the Summer/Fall 2021, our methodology for continued implementation has shifted from Phases to Project based. This was deemed a necessity due to the workload capacity of the CRM Implementation Team, i.e. only so many hours in the day and skillsets of team members. A list of nearly 30 projects was created based on college requests and technological upgrade necessity and sent to College Cabinets to prioritize. This list contained brief explanations of each project, the current level of completion, the level of effort to complete the project, related project dependencies and the categories the project was associated. Categories included: Process Improvement, Compliance, Enrollment, Completion, Communication, Disproportionately Impacted Populations and Board Priorities.

Based on conversations with constituents and reviewing college enrollment, equity, and other campus-based plans and strategic initiatives, College Cabinets ranked the list of projects for the coming year. An average ranking was then taken for each project and makes up the 2021/2022 SSL Project List. A similar project prioritization process is expected to take place during the Summer/Fall 2022, and so on. The entire Project Prioritization List, including brief Explanations and College Rankings can be found here.

2021/2022 STUDENT SUCCESS LINK PROJECTS FOR PRIORITIZATION

<table>
<thead>
<tr>
<th>PROJECT NAME</th>
<th>CURRENT LEVEL OF COMPLETION</th>
<th>LEVEL OF EFFORT</th>
<th>AREAS SUPPORTING</th>
</tr>
</thead>
<tbody>
<tr>
<td>K-12 Students in the SSL</td>
<td>15%</td>
<td>High</td>
<td>Process Improvement, Enrollment, Board Priority</td>
</tr>
<tr>
<td>Transcript Evaluation in the SSL</td>
<td>30%</td>
<td>High</td>
<td>Process Improvement, Completion, Communication</td>
</tr>
<tr>
<td>Degree Works Upgrade</td>
<td>60%</td>
<td>High</td>
<td>Process Improvement, Completion</td>
</tr>
<tr>
<td>Forms in the SSL</td>
<td>10%</td>
<td>High</td>
<td>Process Improvement, Communication</td>
</tr>
<tr>
<td>Veterans in the SSL &amp; New Compliance Requirements</td>
<td>70%</td>
<td>High</td>
<td>Process Improvement, Compliance, Enrollment, Disproportionately Impacted</td>
</tr>
</tbody>
</table>

FINAL THOUGHTS AND FUTURE INVESTMENT

The potential uses of the Student Success Link are limitless and the impact on student engagement has yet to be fully recognized. As more employees and programs become acquainted with the capabilities of the system, it will continue to expand to reflect an enhancement to the student experience and ultimately student success. Currently due to staff capacity, certain aspects of project implementation and maintenance become bottlenecked and take longer to bring to fruition. A dedicated Marketing Cloud and Student Experience (Portal) ITS staff member is needed to alleviate that pain point in implementation and to sustain the constant enhancements to the student experience. Likewise, additional Salesforce licenses are required in order to allow more employees access to the Student Success Link.

With the approval of Board Policy 2.35 Use of District Communication Systems at the April 28th, 2021 Board meeting, drafting of a Student Communications Standard Operating Procedure (SOP) was constructed to support the implementation of texting students in compliance with the Telephone Consumers Protection Act (TCPA), California Consumers Protection Act (CCPA) and CAN-SPAM Act. Additional support hours with our implementation partners.
APEXIT and EnrollmentRx are needed to help ensure our implementation is expedient and compliant with these Acts.

As the Student Success Link directly supports the Goals and Strategies of the District Strategic Plan, the data and metrics compiled by the system will help support the access, success and completion agenda of SMCCCD. The *purchase and implementation of additional data analytics tools within Salesforce and Marketing Cloud* will allow us to better analyze the data within the system, and get it into the hands of the employees responsible for program design and improvement.

Overall, by choosing to implement a CRM within the district has helped to better align the processes and experience of students at all three colleges, while still allowing for the individuality cultures to shine through. Change at this scale is never easy (or fast), but even the small changes made to process can result in enormous gains for students.

For more information on the Student Success Link, please contact Dr. Karrie Mitchell, Vice President of Planning, Research and Institutional Effectiveness (PRIE) at mitchellk@smccd.edu, or at (650) 358-6861.

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**Additional Resources:**

1) SMCCCD Technology Taskforce website: [https://smccd.edu/techtaskforce/](https://smccd.edu/techtaskforce/)


3) 2019 San Mateo County Community College District is a Trailblazer video: [https://www.youtube.com/watch?v=voa5cB2Y8N4](https://www.youtube.com/watch?v=voa5cB2Y8N4)

4) 2019 San Mateo County Community College District Trailblazer video (long version): [https://www.youtube.com/watch?v=OgOiBgljNCF8&t=27s](https://www.youtube.com/watch?v=OgOiBgljNCF8&t=27s)
DISCUSSION OF POTENTIAL NEXT STEPS IN DEVELOPING STUDENT HOUSING

To assist the District in determining demand for student housing, a consultant – Scion Advisory Services (Scion) – was engaged to conduct a study to assess demand. The study was completed mid-year 2020 and the initial results were presented to the Board last fall for discussion. The study concluded that there was strong student demand for below market-rate student housing. The summary analysis from the Scion study is included with this report as Attachment #01.

Based on the original demand study, three original project programs were developed by Scion that included the data in Table 1 below for the construction of a new facility.

Table 1: Original 2020 Program Size and Cost Estimates

<table>
<thead>
<tr>
<th>Project</th>
<th>Gross Square Footage</th>
<th>Estimated Total Cost</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Program I</strong> (Single Student and Students with Families)</td>
<td>398,188</td>
<td>$310M</td>
</tr>
<tr>
<td>Traditional – 643 beds &amp; 423 units</td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>Program II</strong> (Single Students)</td>
<td>491,313</td>
<td>$382M</td>
</tr>
<tr>
<td>Apartments – 643 beds &amp; 423 units</td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>Program III</strong> (Students with Families)</td>
<td>249,188</td>
<td>$193M</td>
</tr>
<tr>
<td>Apartments – 322 beds &amp; 211 units</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Due to the size and cost of the programs outlined above, the Board asked that the project programs be revised to reflect a smaller demand calculation; that revised program mix for the construction of a new facility includes the data included in Table 2 below.

Table 2: Revised 2021 Program Size and Cost Estimates

<table>
<thead>
<tr>
<th>Delivery Method</th>
<th>Project</th>
<th>Gross Square Footage</th>
<th>P3 Estimated Total Development Cost</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Program I</strong> (Single Student and Students with Families)</td>
<td>Traditional – 300 beds &amp; 200 units</td>
<td>228,860</td>
<td>$176M $158M</td>
</tr>
<tr>
<td><strong>Program II</strong> (Single Students)</td>
<td>Apartments – 500 beds</td>
<td>206,013</td>
<td>$123M $110M</td>
</tr>
<tr>
<td><strong>Program III</strong> (Students with Families)</td>
<td>Apartments – 200 units</td>
<td>131,213</td>
<td>$101M $90M</td>
</tr>
</tbody>
</table>
To further the discussion, staff offers the following scenarios, with a brief analysis for each, for consideration by the Board relating to moving forward with student housing:

- **Scenario 1: Build a facility.**
  This would include constructing a new facility within the District exclusively for student housing. As tables 1 and 2 on the prior page showed, there are various options as far as configuration. With this option, the District could create a solution tailored to specific student needs and District financing constraints. If constructing a new facility, initially building a single complex at one campus to serve all colleges is a reasonable approach as it allows for efficiencies resulting from economies of scale. Further, depending on the financing option utilized, it may be necessary to have a project of a certain size to gain interest (i.e. P3). However, building a new facility is a process that could take from three to five years to complete.

- **Scenario 2: Buy a facility.**
  Purchasing a facility could come in two forms: (1) buying an existing residential apartment complex or hotel/motel and utilizing it for student housing, and/or (2) buying an existing commercial property (e.g. office building, etc.) and converting it into student housing. There are both residential complexes (though not of the size contemplated on page 1) and commercial properties for sale in San Mateo County. However, purchasing a residential complex does not address the broader issue of affordable housing in the county, as it would not add any additional housing units to the county’s inventory. Further, buying an existing residential complex and utilizing it for student housing would displace those residents currently living at such a facility.

- **Scenario 3: Lease a facility.**
  Leasing a facility, such as an apartment complex or other housing facility would be a more immediate approach to provide student housing, but, as discussed above, this scenario does not add any additional units of available affordable housing in the area. Leasing would allow for more flexibility than ownership, but with that comes loss of operational control on certain fronts.

- **Scenario 4: Repurpose and renovate existing District building(s).**
  The District owns and operates approximately 100 buildings across its three campuses. A building (or several buildings) could be identified for repurposing/converting and renovation for student housing. This scenario would allow for the use of existing District assets, which could reduce both the cost of the project and time to completion. Further, if utilizing existing buildings, there would be more flexibility in locating housing sites on each campus, rather than a centralized location with a new build.

- **Scenario 5: Provide a stipend to students to secure local housing.**
  Rather than construct, buy or lease a facility for student housing, another possibility would be to provide students in need of housing with stipends to secure housing on their own within the area. This would immediately assist those students in need, as opposed to the time needed to build, buy or lease a facility. Further, under this scenario, the District would not be responsible for developing and maintaining facilities, programs or other operating components of student housing. However, any financial assistance to students would need to consider any impact with a students’ financial aid. Additionally, due to general lack of affordable housing, students may encounter difficulties finding available housing, even with a stipend.

- **Scenario 6: Blend elements of Scenarios 1 – 5.**
  There may be no one single desired solution, so a blend of desired attributes from the scenarios above is also another option. For example, leasing in the short-term while constructing a new facility.
Scenario 7: Do not move forward with student housing.
Under this scenario, the District would determine that for any number of reasons, it is not desirable or feasible to proceed with creating a District student housing program.

To finance Scenarios 1 – 6 as outlined above, staff also offer the following options for the Board’s consideration:

- **Option A: Self-finance.**
  With this option, the District would utilize existing resources, including ongoing dollars, reserves or other available resources, to self-finance a build, buy, lease or stipend for student housing. Though the District has some resources, financing a large construction project outright would be challenging and would make financial resources unavailable for other District priorities.

- **Option B: Issue a Certificate of Participation (COP).**
  The District has used COPs in the past to finance projects. The cost of the repayment of the debt would depend on the size and cost of the project.

- **Option C: Develop a Public-Private Partnership (P3).**
  Utilizing a P3 would allow the District to finance a large student housing project and would minimize the amount of up-front funding the District contributes directly to the project. When utilizing a P3, depending on how much money the District contributes to the project, there is a trade-off about the amount of control and autonomy the District has for the project (e.g. the more money the District contributes, the more control it retains). Further, if utilizing a P3, the project must be of a size that is attractive to potential investors/funders. The programs in Table 2 earlier in this report meet those minimum thresholds. Additional information about P3s is included as part of Attachment #02.

- **Option D: Secure State Funding.**
  In the recently passed state budget, $2 billion was authorized to support the development of affordable student housing among the three segments of higher education: community colleges, the California State University and the University of California. The budget sets aside 50% of the funds for community colleges, 30% for the CSU and 20% for the UC. $500 million will be allocated for 2021-22, and $750 million each for 2022-23 and 2023-24. The California Department of Finance released the guidelines and application for the initial round of funding on October 7; applications are due on October 31, 2021. The first round of funding is marked for “shovel-ready” projects that can be underway by the end of 2022. Additionally, $25 million is available for planning grants. Funding will be awarded between March – July 2022.

  There are additional requirements for accessing the state funds, including, among others: (1) requiring students living in the housing funded by the state grant to take 12 units per semester (i.e. be full-time); (2) funding is for building new construction or buying a commercial property to renovate, not an existing residential facility; and (3) offering units to low-income students first and charging rents at 30% - 50% of area median income.

- **Option E: Blend elements of Options A – D.**
  It may be in the District’s interest to utilize a combination of desired elements from the options outlined above to craft a financing approach to fund student housing development should the Board decide to proceed with such a program. For example, seeking state funding and supplementing with District funds to create an attractive proposal and to achieve policy and service goals.
Addressing Immediate Student Needs

In 2020, the Chancellor authorized the creation of a District-wide Basic Needs Taskforce to address student issues including housing insecurity. The Taskforce, working with the SparkPoint Centers at each campus, developed a Rapid Response Hotel Stay program that provides short-term housing support for students who may be seeking safe and/or stable housing and who would otherwise be unsheltered. Students in the program are eligible for a short-term hotel stay while working with District staff to connect to services of the County’s CORE support agencies. Since the program began, 41 students have applied, six students have been approved and three have utilized the hotel stay services. The program continues to be reviewed and refined to identify ways in which to best serve students in need.

Other Considerations

In addition to the options – both for housing and financing – as provided above, there are several other considerations that staff would like to bring to the Board’s attention when evaluating student housing:

1. Determining the population(s) to be served is important from the beginning. If the desire of the District is to serve low-income students, that needs to be factored into the financing model to determine which approach is best to pursue.

2. If utilizing state funding is an objective, it will be important to understand and reconcile the state’s policy goals and priorities and those of the District. With state requirements to limit housing to full-time students, that would mean that the majority of the District’s students (i.e. part-time students) would not be eligible for the service.

3. Developing student housing is not an all-or-nothing proposition. The District could plan a program – similar to that of our employee housing program – that spans over a period of years. The District could utilize available state funding to build new housing, and later determine to repurpose and renovate existing District buildings or any number of other options.

4. The timing is good for evaluating student housing from a planning perspective as state monies are now available and the District is undertaking a facilities master planning process.

At this study session, staff will summarize the information in this report and invite the Board’s discussion about its preferred direction for student housing.
SMCCCD Student Housing Study - Executive Summary

Introduction and Strategic Objectives

In Spring 2020, San Mateo County Community College District (SMCCCD or District) engaged The Scion Group, LLC (Scion) to assess student demand and financial feasibility for student housing across the District. The study was spurred by the recognition that many students struggle to find safe, affordable housing close to the District’s campuses. At the beginning of Scion’s study, District and College leadership collaboratively established a set of Strategic Objectives: (1) Social Justice Framework, (2) Financial Accessibility, (3) Student Recruitment & Retention, (4) Financial Neutrality and (5) Entrepreneurial Approach. These objectives served as the framework for the quantitative and qualitative research, which resulted in the following findings.

Findings

Demand exists at each SMCCCD campus. The demand for single students is 908 beds at Cañada, 1,089 beds at Skyline or 1,286 beds at CSM. Demand for students with families¹ is 720 units at Cañada, 733 units at Skyline or 846 units at CSM. Mindful of the strategic objectives that promote social justice and financial accessibility, Scion also calculated demand for housing, if offered at a lower price point. This increased single student demand by 407 beds at Cañada, 489 beds at Skyline and by 579 beds at CSM. Demand for students with families increased by 592 units at Cañada, 602 units at Skyline and 695 units at CSM.

Students expressed significant interest in housing offered by the District. Student focus groups and survey data demonstrated that both single students and students with families expressed significant interest in the District adding housing at any of the campuses, with a slight preference for housing at the College of San Mateo. Respondents’ preferred location at CSM was determined by their response to the following question: “SMCCCD is considering offering student housing at three possible locations...potential locations for new housing include College of San Mateo, Skyline College and Cañada College. Please indicate how likely you would have been to live [for the 2019-2020 Academic Year] in SMCCCD housing, by selecting Yes, Maybe or No for each potential location.” Based on survey data, 74% of students across the District expressed some level of willingness (by selecting either Yes or Maybe) to live on campus if housing was located at CSM compared to Skyline (60%) and Cañada (56%).²

¹ Students with families are those who indicated they live with a partner, dependent(s), and/or someone else for whom they are responsible. Scion calculates demand for students with families separately, as generally they prefer renting by-the-unit versus by-the-bed and in acknowledgement of the different living experiences and priorities between the populations.

² Data based on results of an online survey available to all District students between May 13, 2020 and June 15, 2020. During that time 2,551 responses were received. Based on Spring 2020 enrollment of 21,559 students (as provided by the District) the survey margin of error was ±2%, within the target margin of error of ±5%.

thesciongroup.com
Students reported it is difficult to find housing close to the District’s campuses. Survey data indicated that 37% of students found it difficult to find housing within a reasonable commute time to campus and another 6% note their housing is not within a reasonable commute time to campus. Finding housing within a reasonable commute time was only easy for 7% of respondents.\(^1\) Interviews with faculty and staff reiterated and contextualized the challenges students face when finding housing.

Part-time students expressed interest in enrolling full-time if housing were available.\(^4\) Of students not enrolled in 12+ units, 21% indicated they would enroll full-time if housing were available regardless of campus (21%). Students across the District indicated slightly more willingness to enroll full-time if the housing were available at CSM (5%) compared to 4% for both Skyline and Cañada.\(^5\)

Nearly all students believed that housing is important for recruiting and retaining future students. For attracting future students to SMCCCD, 96% of students with families and 95% of single students indicated housing would be important. When asked about retaining students, 94% of students with families and 92% of single students acknowledged the importance of offering housing. Current students further validated that the availability of housing impacts their decisions to stay enrolled. 7% of all students indicated they have a plan to leave school because of local housing costs and 40% have considered leaving.

Preliminary financial modeling for housing programs indicates financially viable projects (traditional-style or apartment units for single students and apartments for students with families) offered at an average of 7% below market rents based on unit types. Complex modeling for different delivery structures, including a public-private partnership (P3) model, indicate viable programs for a feasible student housing project.

In response to the District’s interest in providing an even more affordable housing option for some students, Scion modeled programs that internally subsidized rents for 10% of single-student beds. Scion modeled these beds at a 50% discount. To support the discounted units, the rents for the non-discounted units increased between 1.5% - 9% (from the survey tested rates), depending on the program and unit type.

If the District elected to move forward with student housing through a P3 delivery method, there would likely be significant interest from student housing developers and investors. From Scion’s experience (and depending on the size and location of the project) viable student housing projects that are substantiated by a reputable advisor through a market and demand and financial analysis, typically garner broad interest.

\(^1\) The remaining respondents either indicated it was “neither easy nor difficult” (23%) or that they did not look for housing (27%).

\(^4\) Question only asked of students NOT enrolled in 12+ units.

\(^5\) Single students (37%), compared to students with families (31%), were slightly more likely to indicate the availability of housing would encourage them to enroll full-time.
Overview of Financing & Delivery Options

There are a range of financing, ownership, and delivery options available to the District. Decisions on structuring any deal are typically based on each structure's ability to achieve the Strategic Objectives, advance the institutional mission, provide access to the most efficient capital, and strike the best balance between risk and control on behalf of the institution. Figure 1 below provides a visual representation of the increasing transfer of risk by the delivery method.

**District Bond Financing (highest risk and greatest control)**

In this scenario, the District would finance the project on its own. The District would bear all developmental, financial, and operational, risks associated with the development and management of the project. However, the District would maintain absolute control over all project decisions. This scenario would also likely achieve the lowest cost of financing for the project. Scion notes that under this scenario the District and its program manager/advisor would be solely responsible for the procurement of third-party contractors.

**Private Developer (least risk and least control)**

In this scenario, a third-party developer would bear all risk and would maintain control over most, if not all, decision making. If the relationship between the developer and the District is that of lessor and master lessee, then the developer is only obligated to include the District in decision-making as stipulated in the lease agreement. This scenario generally produces the highest cost for the District's students as the District is essentially financing (through rents) the developer's taxable debt and equity financing, plus risk and profit premiums.

thesciongroup.com
Public-Private Partnerships (balance of risk and control)

The P3 option entails working with a private developer to bear the development risk and a not-for-profit owner to bear the operational risk and liability for the debt. The allocation of risk and responsibilities is clearly delineated in the two primary project documents: the ground lease and the coordination agreement.

To qualify for tax-exempt financing through 501(c)3 structure, the project must serve residents affiliated with the District and defined in the project documents. If the District elects for a P3 delivery, the procurement process should articulate guidelines consistent with its mission and the Strategic Objectives previously defined. Student housing P3 projects are typically (but not always) financed with tax-exempt debt; and therefore, they provide a competitive cost of financing that translates into lower rents for District stakeholders.

From a broad perspective, the P3 option offers the following advantages:

1. Preserves District capital and borrowing capacity
2. Transfers development risk to a 3rd party and operational risk to a not-for-profit entity who owns the improvements during the term of the ground lease
3. Leverages private sector resources for District use
4. Provides residual cash flow to the District assuming sufficient project performance

In student housing P3 projects, the Debt Service Coverage Requirement (DSCR) serves as a key metric in determining the financial viability. The DSCR represents the cash available for debt service (after expenses and reserve capitalization) divided by the annual debt service. Typically, the DSCR must be at 1.20 or higher on a stabilized basis to garner interest from developers and investors.

Due to the required yield and financing costs associated with P3 projects, the overall cost is higher than if the District were to finance the project on its own, but the risk transfer away from the District is compelling. Typically, P3 financing costs are significantly lower than a private developer-led transaction. Compared to self-funded projects and private developer projects, the P3 delivery option offers a “middle-ground” with risk, cost, and control.
The organizational chart illustrated below in Figure 2 is a general overview of the structure of a Public-Private Partnership. Scion notes that there are many different P3 structures as this process is highly specific to each institution.

Figure 2: P3 Organization Chart
Figure 3 compares features of each of the discussed financing structures.

<table>
<thead>
<tr>
<th>Project Feature</th>
<th>Self-Finance</th>
<th>P3 – 501(c)3 Owned Tax Exempt Financing</th>
<th>P3 – Developer Owned Taxable Financing</th>
</tr>
</thead>
<tbody>
<tr>
<td>Project Control</td>
<td>100% District</td>
<td>Shared with District maintaining control over major project decisions</td>
<td>Primarily developer</td>
</tr>
<tr>
<td>Cost of Funds</td>
<td>Lowest</td>
<td>Mid-range</td>
<td>Highest for taxable debt and/or equity</td>
</tr>
<tr>
<td>Project Security</td>
<td>District enterprise revenue</td>
<td>Project revenue</td>
<td>Project revenue and developer recourse</td>
</tr>
<tr>
<td>Project Term</td>
<td>N/A</td>
<td>30-40 years (ground lease)</td>
<td>30-50 years (ground lease or concession agreement, longer for equity)</td>
</tr>
<tr>
<td>Access to Residual Cash Flow</td>
<td>District</td>
<td>District</td>
<td>Developer/Investors (taxable structure can convey upfront or ongoing lease revenue to District)</td>
</tr>
<tr>
<td>Construction Period Liability</td>
<td>District</td>
<td>Developer</td>
<td>Developer</td>
</tr>
<tr>
<td>Operational Liability</td>
<td>District</td>
<td>Owner (residual cash flow at risk to performance)</td>
<td>Developer (prioritized cash flow at less risk during operations)</td>
</tr>
<tr>
<td>Balance Sheet Impact</td>
<td>100% District</td>
<td>Minimal depending on project specific guarantees</td>
<td>None</td>
</tr>
<tr>
<td>Credit Impact</td>
<td></td>
<td>Dependent on project performance and mission enhancement</td>
<td></td>
</tr>
<tr>
<td>Delivery and Operational Efficiency</td>
<td>Project assumes overall portfolio level efficiency</td>
<td>Stand-alone operations with District participation in major decision making enhances efficiency</td>
<td>Highest efficiency but in service to Developer and lenders/Investors with minimal District control</td>
</tr>
<tr>
<td>Project Recapitalization</td>
<td>Project competes against other portfolio CAPEX requirements</td>
<td>Project funded and directed, although typical funding requirements are light compared to system replacement needs</td>
<td>Project funds 100% of CAPEX needs</td>
</tr>
</tbody>
</table>