

PROFESSIONAL SERVICES PROPOSAL



Demographic Study & Developer Fee Level 2

District: San Leandro Unified School District
Mark Martinelli
835 E 14th Street
San Leandro, CA 94577

Contractor: SchoolWorks, Inc.
6815 Fair Oaks Blvd, #3
Carmichael, CA 95608
Attn: Brett Merrick, Vice President
Phone: (916) 733-0402
Email: brett@schoolworksgis.com

Description

Thank you for the opportunity to present this professional services proposal for a Demographic Study and Developer Fee Study Level 2. This proposal provides a historical company background, a general overview of our services and a cost summary

Precise and accurate Demographics and Enrollment Projections are crucial to making well-informed decisions that will provide the best educational experience possible. Whether your district is growing or declining, SchoolWorks Demographic Studies will help chart the right course through your districts unique challenges.

Company Background

SchoolWorks is a leader in the field of Facility Planning and Demographic Analysis. Our firm has an experienced team of professionals who have helped guide school districts, both large and small, throughout the State of California for more than 20 years. Services provided by SchoolWorks include Demographic Studies, Enrollment Projections, Boundary Study Analysis, GIS Planning Software, Facility Master Plans, Developer Fee Studies and State Building Application Services. Our headquarters is located in Sacramento with satellite offices conveniently located in Central and Southern California.

Scope of Work

The Study will be processed using the SchoolWorks GIS Facility Planning software program. This powerful program allows SchoolWorks to visualize, explore, query and analyze large complex data files and uncover past and future trends that give us an insight on the direction your district may take in the future.

Enrollment Projections

The enrollment projections are processed by counting and analyzing the number of students in each attendance boundary by grade level for each of the last four years. A cohort survival method is then used to project the number of students for up to ten years in the future. An adjustment is made for inter and intra district transfer students based on historical data to calculate the projected enrollments for each school. There are also augmentations made to account for the new housing developments within each school boundary and to adjust the projected kindergarten enrollment based on birth statistics. The enrollment projections are presented both by school and for the entire district.

Neighborhood School Attendance Area Analysis

Each school attendance boundary will be input into our GIS system. Students are counted in each of the attendance area boundaries based on their residential address and can be studied to view optimum and balanced utilizations. Attendance pattern maps for each individual boundary will analyze impacts of intra district transfers from within the district boundary, as well as inter district transfers from neighboring school districts.

Housing Development and Yield Rate Study

New housing development can have a significant impact on future facility and demographic planning. A complete analysis of all current and future new housing developments will be researched by working with city, county and other local municipalities. A student yield rate analysis will also be conducted using the most current Census data.

Facility Planning and Utilization

By reviewing current district loading standards and how many available classrooms are situated at each school site, we can determine which schools have room for growth, which schools are overcrowded or which school sites may need to be considered for boundary changes or grade level reconfiguration.

Level 2 Developer Fee Study

Using the information from the demographics study, a Level 2 study will be completed to determine the maximum amount of development fees the District is allowed to collect to meet the needs of the impacts caused by new development projects. This analysis follows all the requirements that are outlined in the Government Code. The study also verifies the district meets the eligibility requirements in order to be able to enact Level 2 fees. This study will be provided as a separate document from the Demographics Study and will require a 30 day public notice before it can be approved by the School Board.

Project Completion

Upon approval of this signed professional services proposal, SchoolWorks will provide a request for information list to the appointed District Representative. The estimated time to complete the Demographic and Level 2 Developer Fee Study will be approximately two months from the time all the necessary data has been collected. Once SchoolWorks has analyzed all the data, we will prepare our findings in a draft report for the District to review. After a final draft has been approved, SchoolWorks will present those findings to the District. Attendance at one board meeting or is included in this services proposal. If SchoolWorks presence is requested at additional school board meetings or other committee meetings beyond the scope of work in this proposal, the District will be billed at an hourly rate, plus travel time and expenses.

Proposed Cost & Terms

The Contractor, SchoolWorks, Inc. will contract to perform the tasks enumerated below for the prices indicated. The District, San Leandro Unified School District is authorized to enter into this agreement by Government Code 53060.

SERVICES

Geocode Student Enrollment Data October 2016, 2015, 2014, 2013	
Analyze Student Demographics	
Prepare Enrollment Projections	
Facility Utilization Analysis	
New Housing Impacts and Yield Rate Study	
Prepare Demographic Study	
Prepare Level 2 Developer Fee Study	
Revisions to Drafts as needed	
One (1) Board Presentation	
School Locator Website Service	
DEMOGRAPHIC STUDY & ENROLLMENT PROJECTIONS SUBTOTAL	\$9,000.00
DEVELOPER FEE LEVEL 2 STUDY SUBTOTAL	\$5,500.00
TOTAL PROJECT COST	\$14,500.00

If SchoolWorks presence is requested at additional school board meetings or other committee meetings beyond the scope of work, the district will be billed at \$140 per hour, plus travel time and expenses.

Payment Schedule

The full amount of \$14,500 will be billed upon completion of the Studies. The amount is due within thirty days of the date of the invoice. If SchoolWorks presence is requested at additional school board meetings or other committee meetings beyond the scope of work, the district will be billed at the end of each month during which those additional services were provided.

San Leandro Unified School District


Signature

Name

Title

Date

SchoolWorks, Inc.



Signature

Ken Reynolds

Name

President - SchoolWorks, Inc.

Title

August 21, 2015

Date

Experience and Resumes

KENNETH REYNOLDS – PRESIDENT

As the President of SchoolWorks, Ken Reynolds has had over twenty years of experience. Ken has assisted over 200 California School Districts in applying for the maximum eligible State funding for new construction and modernization projects. Throughout his associations with District personnel, he has helped them solve their unique issues, such as State funding assistance, developer fee eligibility, scenarios for boundary changes, calculating enrollment projections and developing functional Facility Master Plans.

Ken has assisted clients in making important decisions regarding facility planning issues by doing research, analyzing information and presenting the results and several options to School Boards and Superintendents. He also has extensive experience working with the community and committees to collaborate and accomplish the goals of the project.

EDUCATION

Bachelor of Science Degree, Electrical and Electronics Engineering, California State University at Sacramento

BRETT MERRICK – VICE PRESIDENT, OPERATIONS

Brett has over eighteen years of experience working with GIS-based facility planning software and demographic analysis. As a founding member of SchoolWorks, Brett oversees the day-to-day project operations of all facility planning and demographics projects. He is responsible for ensuring that SchoolWorks meet and exceeds the expectations of our clients and providing the best service possible.

EDUCATION

Bachelor of Science, Geography, University of Nevada Reno

Certificate in Educational Facility Planning, University of California Riverside, enrolled

OWEN ALVAREZ – VICE PRESIDENT, SCHOOL FACILITIES PROGRAM

Owen has over sixteen years of experience in the field of mechanical engineering, energy analysis and information technology. He is responsible for the School Facilities Program (SFP) project submittals to OPSC and CDE, financial hardship applications and emergency repair program applications. He provides a valuable resource to school districts seeking state funding for construction and modernization projects.

KATHY REYNOLDS – GIS MANAGER

Kathy has eight years of experience working with GIS-based facility planning software. She is the principal in charge of new housing development activities corresponding with both City and County Planning Commissions as well as local developers. She is the lead Project Manager for Developer Fee Studies.

EDUCATION

Master of Science – Biological Sciences, California State University Hayward
Certificate in Educational Facility Planning UCR Extension, currently enrolled

Client References

PROJECT	CONTACT
Earlimart School District <ul style="list-style-type: none"> Demographics and Boundary Study 	Sandra M. Rivera, Superintendent 785 East Center Avenue Earlimart, CA 93219 (661) 849-4241
Burton School District <ul style="list-style-type: none"> Demographics and Boundary Study 	Dr. Sharon Kamberg, Superintendent 264 N. Westwood Street Porterville, CA 93257 (559) 781-8020
Morgan Hill Unified School District <ul style="list-style-type: none"> Demographics and GIS Services 	Anessa Espinosa, Director Facilities/Maintenance 15600 Concord Circle Morgan Hill, CA 95037 (408) 201-6000
Visalia Unified School District <ul style="list-style-type: none"> Facility Master Planning services and Boundary Study 	David Loverin, Director I – Admin Services 5000 West Cypress Avenue Visalia, CA 93277 (559) 730-7300
Vacaville Unified School District <ul style="list-style-type: none"> Demographics and GIS Services 	Dan Banowetz, Director of Facilities 401 Nut Tree Road Vacaville, CA 95687 (707) 453-6139
Fairfield-Suisun Unified School District <ul style="list-style-type: none"> District-Wide Facility Master Planning services 	Kim Van Gundy, Director – Facilities & Construction 2490 Hilborn Road Fairfield, CA +4534 (707) 399-50000
Central Unified School District <ul style="list-style-type: none"> Demographics and Boundary Study 	Kelly Porterfield, Asst. Supt. Chief Business Officer 4605 N. Polk Avenue Fresno, CA 93722 (559) 274-4700
Rocklin Unified School District <ul style="list-style-type: none"> Demographics and Boundary Study 	Sue Wesselius, Director of Facilities 2615 Sierra Meadows Drive Rocklin, CA 95677 (916) 630-3188