



schooladvisors

November 17, 2017

Ms. Carolyn Chow
Chief Business Official
San Mateo Foster City School District
1170 Chess Drive
Foster City, CA 94404

Subject: Proposal to San Mateo Foster City School District for Entitlement Services to update New Construction and Modernization Eligibility and to manage the agency approval process for all District projects to ensure State Funding application and approval

Dear Ms. Chow:

Schooladvisors is pleased to submit this proposal to support the San Mateo Foster City School District with entitlement services to update New Construction and Modernization Eligibility and assist with management of the agency approval process to secure future State Funding.

A. Scope of Services

School Advisors (“Consultant”) shall provide professional services to the San Mateo Foster City School District (“District”) in the following areas:

I. Entitlement Services, as described below:

1. Update district-wide New Construction Eligibility under the current State School Facilities Program (SFP) utilizing October 2017 CBEDS with the Office of Public School Construction (OPSC)
 - Analyze and update New Construction Eligibility to maximize funding (Completion of SAB 50-01)
 - ❖ Four (4) Years of October CBED enrollment information (October 2013-2016)
 - ❖ Development Tracking – Identification of all current developments and active approvals necessary to augment (SAB 50-01) enrollment projection for State New Construction eligibility purposes
 - Coordination with City and/or County to identify all current or planned development

- In accordance with AB 1014 (Alternative Enrollment Weighting) analyze and determine the most beneficial enrollment weighting
 - ❖ Utilization of proprietary developed software which maximizes enrollment weighting, testing thousands of possibilities. Data utilized in the analysis is the following:
 - Dwelling Unit Augmentation (Development)
 - Birth Rates (County and Zip Code)
 - ✓ School Advisors will gather this information
 - Analysis of enrollment trends for the past 18 years
 - ✓ School Advisors will collect the 18 years of enrollment history, utilizing the California Department of Education's (CDE) Dataquest database, and separate Special Education enrollment per required Regulation
 - ❖ Software has successfully increased eligibility for multiple districts and has been approved by OSPC
2. Establish/Update Modernization eligibility in the State Facilities Program for all 21 school sites, utilizing October 2017 CBEDS.
- Analysis of age qualified buildings and site size
 - Filing of SAB 50-03's (Eligibility Determination) or similar forms for all district sites
 - Modernization funding summary for current eligibility, as well as a report identifying future eligibility, which identifies the year and amount of funding anticipated within the next 10 years for all sites. (10 Year Funding Projection)
 - Participation in OSPC Site Verification visit to walk sites submitted for Modernization eligibility for the first time
3. Monitor and manage the agency approval processes for all district projects to ensure agency approval is received.
- Provide agency approval timeline for each project to assist District staff in monitoring progress of approvals
 - Track OPSC processing of submitted applications to ensure availability of district staff and architectural firm staff for inevitable 15-day and 4-day letter responses
 - Provide advice/assistance on an as needed basis

4. Completion of CDE Plan Approval submittals for all projects, (SFPD 4.07's (New Construction) & 4.08's (Modernization))
5. Completion of all applications for funding with the Office of Public School Construction (OPSC) for all projects
 - SAB 50-04 (Funding Application) or similar form
 - SAB 50-05 (Fund Release) or similar form
 - Priority in Funding letters
6. OPSC Advocacy
 - 15-Day, 4-Day and 24 hour notices for all projects
 - Expenditure reporting assistance and review

B. Compensation

- I. School Advisors shall provide the services outlined in the scope of services Section (1) identified above, for a fixed fee of \$5,000. This fee excludes extraordinary out of pocket expenses, (such as air travel or Lodging), when incurred at the specific request of the district, in accordance with requested services. Such out of pocket expenses must be approved by the district, prior to the expense being acknowledged.
- II. School Advisors shall provide the services outlined in the scope of services Section (2) identified above, for a fixed fee of \$1,000 per school site where eligibility is either established or updated. The number of sites to determine eligibility will need to be determined, to set a Not to Exceed amount. This fee excludes extraordinary out of pocket expenses, (such as air travel or Lodging), when incurred at the specific request of the district, in accordance with requested services. Such out of pocket expenses must be approved by the district, prior to the expense being acknowledged.
- III. School Advisors shall provide the services outlined in the scope of services Section (3) identified above, on a Time and Materials Basis of \$190 per Hour. The Not to Exceed amount will be dependent on the number of projects to track, which will need to be determined. This fee excludes extraordinary out of pocket expenses, (such as air travel or Lodging), when incurred at the specific request of the district, in accordance with requested services. Such out of pocket expenses must be approved by the district, prior to the expense being acknowledged.

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- IV. School Advisors shall provide the services outlined in the scope of services Sections (4-6) as needed, on a fixed fee of \$5,000 per project. This fee excludes extraordinary out of pocket expenses, (such as air travel or Lodging), when incurred at the specific request of the district, in accordance with requested services. Such out of pocket expenses must be approved by the district, prior to the expense being acknowledged.

Sincerely,

A handwritten signature in dark ink, appearing to read 'T. Cavanagh', with a stylized, cursive script.

Thomas M. Cavanagh
President

Carolyn Chow
Chief Business Official
San Mateo Foster City School District