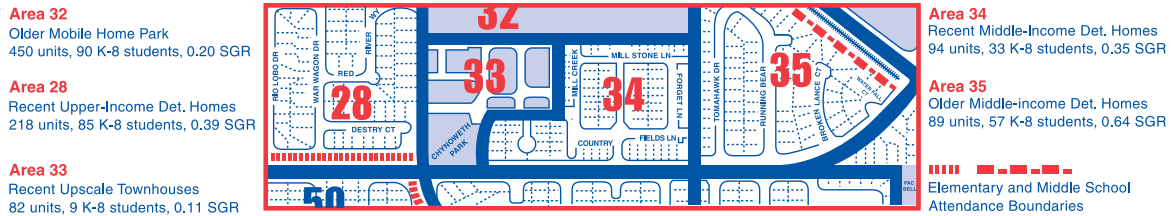


ENROLLMENT PROJECTION CONSULTANTS

Providing School Districts with Accurate Enrollment Forecasts by Location



Superintendent Cheryl Jordan
Milpitas Unified School District
1331 E. Calaveras Blvd.
Milpitas, CA 95035

June 20, 2017

Dear Superintendent Jordan:

This is a Proposal for Services for both an enrollment forecast update and to provide any district-requested on-call work in 2017-18. This proposal is similar to that for 2016-17.

The specific tasks proposed for this update are:

- (1) Obtain from SchoolVision Software the already-processed-by-planning-area file of your October 2017 student enrollment records;
- (2) Aggregate those counts by existing dwelling types, general income levels (interpolated from housing values) and regions within the district, calculate the changes that have taken place in each of those situations, and then evaluate those shifts for the likelihood to continue, by degree (with particular consideration for any locations where the current student population differs notably from the latest projections; all of this work is far more involved than it sounds);
- (3) Calculate the SGRs coming from recently built housing, by type, in the district, for the purpose of applying to any projected similar dwelling units;
- (4) Identify the latest local birth figures and compare those to recent district kindergarten totals, with a review of how the ratios of annual births to corresponding (five years later) kindergarten amounts have been evolving;
- (5) Meet with the City of Milpitas planning department and, as necessary, representatives of underway developments regarding new housing by location for the next decade; and
- (6) Write a concise "letter format" report that describes the key trend findings and the updated projections.

The cost to complete such a study will be \$9,400 provided that you have a concurrent contract with SchoolVision Software that covers the processing of your student file. Assuming that student file is (1) provided to SchoolVision no later than October 30 and (2) is complete and accurate, with total counts by grade that are extremely close to the official figures taken for early October (unless there is a reason that they should be different, such as for NPS students that are not maintained in the district database), then we will complete the forecast numbers by no later than December 21 and the draft report no later than December 28.

I also propose to bill additional district-requested tasks on an on-call basis for time and expenses. This would include any meetings such as a report presentation to the Board. The cost for each such meeting could be in the vicinity of \$850. This is based on the assumption of an average of 2.0 hours of necessary prep work, 2.0 hours of round-trip driving (with one direction during "rush hour") and an average of 1.5 hours of meeting time, plus expenses (mainly mileage). That labor will be billed at \$150/hour for my time, plus expenses. Any necessary support work from my partner, Vicki Williams, will be billed at \$100/hour plus expenses.

You have a better concept than I of how much the district might need these on-call services. You may not need these at all. If there are going to be a series of meetings with the public and/or a committee that I will both need to attend and provide evolving data for, however, then we may need an on-call maximum of \$3,000. If you may only need me for a single meeting and an occasional task, then a \$1,500 cap could suffice. This work can be handled either in a separate contract or combined with the forecast study into one not-to-exceed amount, such as \$10,900 (some of which may not be billed). Most districts pay for these tasks with developer fee revenues.

Billings for the forecast update portion of this budget will occur as follows: 50% at the start of the study and 50% after delivery of the written report to the district. Any other work will be periodically invoiced.

I look forward to working with your district again.

Sincerely,

A handwritten signature in black ink, appearing to read "Thomas R. Williams", with a long horizontal flourish extending to the right.

Thomas R. Williams, Partner in Enrollment Projection Consultants