

Proposal for Consulting Services

Prepared for:

Alpine County Unified School District
and Office of Education

Attention:

Patrick Traynor, Ph.D.

Superintendent

Email: ptraynor@alpinecoe.k12.ca.us

Phone: (530) 694-2230

Primary Contact:

Matthew A. Pettler

Vice President

Email: matt@s-f-c.org

Phone: (916) 441-5063

Letter of Transmittal

December 21, 2018

Patrick Traynor, Ph.D.
Superintendent
Alpine County Unified School District
and Office of Education
43 Hawkside Drive
Markleeville, CA 96120

Subject: Proposal for Consulting Services

Dear Mr. Taynor:

School Facility Consultants (SFC) is pleased to present the Alpine County Unified School District and Office of Education (Client) with this Proposal for Consulting Services. We look forward to working with you and the Client on its facility projects.

SFC has extensive experience in assisting small clients obtain the maximum funding for its projects.

SFC is very experienced in providing creative solutions for clients:

- ✓ We have extensive experience in obtaining multiple funding sources for single projects.
- ✓ We assist clients to determine the optimal project prioritization based on funding availability.
- ✓ We work to maximize project savings allowing quicker access to State funding and more flexibility with State funding to match local needs.
- ✓ We assist small clients with a review of financial hardship funding and other funding augmentation specifically available to small clients available through the School Facility Program.

We very much appreciate your consideration of our firm and are happy to discuss in detail any of the proposed services. Please do not hesitate to contact us at your earliest convenience with any questions.

Sincerely,



Matthew A. Pettler
Vice President

Experience and Qualifications

FIRM INFORMATION

School Facility Consultants (SFC) has assisted its clients in all aspects of school facility funding and planning since 1986. We have worked with clients to realize over five billion dollars in school facility funding including new construction, modernization, and renovation projects. Our knowledgeable staff understands the intricacies of the planning and funding process in California, including the procedures and requirements of the California Department of Education (CDE), Office of Public School Construction (OPSC), Division of the State Architect (DSA) California Energy Commission (CEC) and Department of Toxic Substances Control (DTSC).

With decades of combined experience in a wide range of school facility issues, we at School Facility Consultants are committed to integrity, professionalism and excellence in all that we do. We are comprised of a diverse group of motivated individuals guided by the shared endeavor of applying analysis and strategy to achieve concrete results for our clients.

At SFC, we offer a full-range of comprehensive services and work closely with clients to become a seamless extension of facility teams. Based in Sacramento, our consulting teams are active in the implementation, analysis, and monitoring of State programs and regulations. We have developed strong working relationships with state agency staff members and bring a deep understanding of facility planning to each of our client's projects.

SFC's team structure provides its clients with reliability, accessibility and a broad knowledge base. The SFC partners maintain direct involvement with clients through regular communications with the consulting teams maintain strong connections between consultants and clients. A Senior Consultant serves as the primary client liaison and manager of each client's project issues. Additional consulting staff is available on the team to provide additional support, research, and production of work product. Team Leaders manage workload and troubleshoot potential issues for the team. The team approach ensures that a consultant is always available to provide immediate assistance to clients. By working collaboratively, our consulting team members contribute their individual expertise toward an extensive and comprehensive knowledge base that addresses the unique needs of individual clients.

SFC was built upon its strong values, culture, and work ethic. These qualities make for a highly effective and successful work environment for its staff, promoting teamwork and providing valuable opportunities for individual employee growth potential. This positive environment encourages productivity, and allows for the highest level of service for its clients.

Experience and Qualifications

STATE FUNDING ELIGIBILITY AND APPLICATION

California school districts and county offices of education have the potential to realize significant State funding contributions through individualized analysis of funding eligibility under the State's School Facility Program (SFP). SFC consulting staff is trained to analyze complex data sets in order to determine eligibility and access funding available through the Office of Public School Construction (OPSC) and other State agencies. SFC assists districts in navigating the multi-step requirements and coordinating with these agencies through the entire funding process.

FUNDING STRATEGY

By synthesizing our various areas of technical expertise, SFC consulting staff is equipped to develop complex and effective long and short term funding strategies that provide proven results in facilities funding. As a full-service consulting firm, SFC has the ability to take school district facilities projects from start to finish, applying methodology that garners the greatest funding gains while addressing specific and individual project needs which may evolve during the life of the project. SFC assists districts in providing a long term strategy which results in maximizing outside funding sources to expand the life of their local funding availability. These efforts ultimately afford our districts with the ability to provide additional and enhanced learning environments for students.

PROJECT CLOSEOUT AND AUDIT SUPPORT

As part of participation in the SFP, school districts and county offices of education are required by statute and regulation to conform to a number of certifications, as well as to ensure that funds received are expended appropriately. As part of the project closeout process SFC assists districts in compiling the documentation necessary to demonstrate conformance with expenditure requirements and the numerous certifications in order for districts to retain their awarded project funding amounts.

MASTER PLANNING

Districts utilize Master Plans to forecast their facility needs into the future. SFC produces comprehensive Master Plans for districts, which assess potential impacts associated with outside area developments such as new residential development, shifts in demographic trends, and fluctuating district boundaries. Unification studies, territory transfer and school site placement are interpreted as the physical needs of districts' facilities are also assessed and addressed through use of Master Plans.

DEVELOPER FEE STUDIES

School districts are authorized to collect impact fees on new residential and commercial/industrial development pursuant to California law. The preparation of developer fee studies in accordance with statute is required in order for districts to collect these fees. These studies utilize local district data, including new residential development, historical statistical information, and school construction costs to determine the dollar amount that can be justified for collection by the school district. SFC's Planning Division prepares Justification Studies (Level 1) and School Facility Needs Analysis Studies (Level 2 and 3) according to the State Allocation Board's (SAB) provisions.

DEVELOPMENT MITIGATION SERVICES

SFC assists districts with development mitigation services. Services include Student Generation Rate Studies, Mitigation Impact Reports and Fair Share Studies. SFC consulting staff is available to provide comments on the potential impact of planned developments including general plans, specific plans and environmental impact reports. SFC consultants provide Geographic Information System (GIS) mapping services to inform student generation rates on a Client-wide basis, by attendance area and for specific development projects. Should a client experience a fee challenge, staff are available to provide expert witness testimony and/or a professional review of developer fee justification reports or mitigation agreements.

Experience and Qualifications



Alexander R. Murdoch

School Facility Consultants, President/Partner

PROFESSIONAL QUALIFICATIONS

Alex Murdoch has worked in the school facility industry for over twenty-five years providing consulting services for clients in all areas of school facility planning and funding. As President and Partner of School Facility Consultants, Alex applies sophisticated methodologies to the facility funding and planning process resulting in the successful, timely delivery of innovative and complex projects.

As an industry leader, Alex is credited with a number of significant accomplishments including innovative planning that resulted in funding for a school district's reuse of commercial property for educational and economic revitalization purposes, being first to secure a lease/lease-back funding guarantee from the Office of Public School Construction for a school district and being first to receive special, legislated funding for a school district's multi-story replacement project.

Alex applies a nuanced approach to the political intricacies of the allocation of school facilities funding. He works to increase the Federal commitment to California school facilities. Alex specializes in identifying statewide policy trends, which are beneficial to the firm's clients. As an appointed member of statewide committees, Office of Public School Construction's Ad Hoc Committee in 2007 and the Coalition for Adequate School Housing's Grant Adequacy Committee in 1999, Alex has been instrumental in contributing to changes in regulations and legislation that benefit schools in California today.

Alex has crafted dozens of successful appeals to the State Allocation Board, brought numerous special items before the State Allocation Board and has crafted successful statewide bond provisions. His expert understanding of California Ed code and School Facility Program regulations has resulted in millions of dollars of funding for California school districts.

Education:

Bachelor of Arts - Political
Science and Economics,
University of California, Davis

Years with Firm:

25

Professional Affiliations:

C.A.S.H. – Coalition for
Adequate School Housing
C.A.S.B.O – California
Association of School Business
Officials
School Energy Coalition
Californians for School
Facilities
Small School Districts
Association
County School Facilities
Consortium

Experience and Qualifications



Matthew A. Pettler

School Facility Consultants, Vice President/Partner

PROFESSIONAL QUALIFICATIONS

Matt Pettler has been with School Facility Consultants (SFC) for over 20 years. Matt became a Principal and Partner in the Firm in January of 2007. Matt currently serves as Vice President and has assisted over 100 clients receive billions of dollars in capital outlay funds for public school facilities in California. Matt specializes in managing client projects in all areas of the State School Facility Program as well as leading developer fee mitigation and Facility Master Planning efforts.

During his time with SFC, Matt has played a key role in multiple successful school district appeals before the State Allocation Board gaining over \$507 million dollars in Financial Hardship, Overcrowding Relief Grant and Facility Hardship funding. Matt has also assisted many school districts with complex audit/closeout issues to reach successful outcomes and avoid Material Inaccuracy penalties.

Additionally, Matt has prepared developer fee justification documents and successfully worked with the Building Industry Association (BIA) to secure millions of dollars needed to offset the impact of new residential development. He has led master planning teams in a number of school districts, allowing those districts to plan and execute successful bond elections to construct needed facilities for students.

Through these successes Matt has established relationships with State Allocation Board members, their staff and State Agency leadership.

Education:

Bachelor of Arts - Political Science and Public Policy, University of California, Los Angeles

Years with Firm:

20

Professional Affiliations:

C.A.S.H. – Coalition for Adequate School Housing

C.A.S.B.O – California Association of School Business Officials

School Energy Coalition

Californians for School Facilities

Small School Districts Association

County School Facilities Consortium

Awards:

Matt is a 2011 Coalition of Adequate School Housing Service Award Recipient

**School Facility Consultants
Contract for Services with
Alpine County Unified School District and Office of Education**

This document represents an agreement between, **Alpine County Unified School District and Office of Education** herein referred to as the Client, and **School Facility Consultants**, herein referred to as the Contractor.

For the remuneration stipulated, the Contractor shall provide the following services.

1. Assist the Client to review, prepare and submit documentation required to maximize the Client's current Modernization eligibility under the State School Facility Program:
 - a. Review site Diagrams for square footage, classroom counts and age of facilities
 - b. Review current CBEDS enrollment data
 - c. Prepare and submit SAB 50-03 *Eligibility Determination* forms

2. Review, prepare and submit documentation required to establish the Client's New Construction eligibility under the State School Facility Program:
 - a. Prepare and Submit SAB 50-01, *Enrollment Certification/Projection* form including:
 - Historical and Current CBEDS Enrollment Data Review
 - Ten-Year Enrollment Projection
 - Five-Year Enrollment Projection
 - Modified Weighting Mechanism Review (AB 1014)
 - Birth Attendance Rate Adjustment Review (County & Zip Code)
 - b. Prepare and Submit SAB 50-02, *Existing School Building Capacity* form including:
 - Prepare Detailed Site Map/Diagram Documentation
 - Prepare Detailed Facility Inventory Review
 - Outline School Facility Program Regulation Exclusions for Applicable Facilities
 - Prepare Detailed Site Analysis Worksheets for Each School
 - c. Prepare and Submit SAB 50-03, *Eligibility Determination* form

3. Assist Client to prepare and submit Application for Financial Hardship Status under the School Facility Program.
 - a. Work with Client to assemble required eligibility documentation and financials
 - b. Prepare and submit SAB checklists and forms
 - c. Work with OPSC staff on review and submittal

4. Assist with the preparation and submittal of California Department of Education plan approval requests

5. Prepare, submit and monitor State Allocation Board New Construction applications projects as determined by the funding opportunities identified:
 - a. Work with project team to maximize the amount of the funding request for the New Construction project
 - b. SAB 50-04, *Application for Funding* and justification documents
 - c. SAB 50-05, *Fund Release Authorization* and justification documents

6. Prepare, submit and monitor State Allocation Board Modernization applications projects as determined by the funding opportunities identified:
 - a. Work with project team to maximize the amount of the funding request for the Modernization Construction project
 - b. SAB 50-04, *Application for Funding* and justification documents
 - c. SAB 50-05, *Fund Release Authorization* and justification documents

7. Assist Client with planning services, as requested by the Client, and as accepted by SFC

The Client shall pay the Contractor on a time and material basis at the hourly rate schedule below. Fee estimates are attached. The Contractor will bill the Client in increments of 15 minutes, and invoice on a monthly basis. The fees shall cover all normal business expenses incurred in Sacramento by the Contractor on behalf of the Client. Client agrees that if it becomes necessary for a Consultant from School Facility Consultants to visit the Client, the Client will pay for travel time per the rate schedule below. Client also agrees to reimburse Contractor for all necessary and pre-approved travel expenses.

<u>SFC Hourly Rate Schedule</u>	
Principal	\$240.00 per hour
Director	\$200.00 per hour
Senior Consultant	\$195.00 per hour
Consultant	\$175.00 per hour
Research Analyst	\$145.00 per hour
Administrative Support	\$ 90.00 per hour

The Client shall be responsible for reviewing and verifying all data included in documents, forms and reports prepared by the Contractor on behalf of the Client. The Client shall be responsible for meeting any certification requirements and shall be responsible for consulting legal counsel as related to the preparation and submittal of documents, forms and reports.

It is understood that the Contractor shall function as an independent contractor without authority to obligate the Client for any indebtedness or other commitments. The Contractor will accurately and fairly represent the Client's position.

During the term of this agreement, the status of those individuals performing the work stipulated in this contract may change. Changes to an individual's status may affect billing rates. The Client agrees to accept these changes. The Contractor agrees that any such changes in status will be reflected on the bill.

The terms of the agreement shall remain in force unless mutually amended. This agreement may be terminated by either party upon 30 days written notice.

SUBMITTED BY:

School Facility Consultants



Authorized Signature

Date: December 21, 2018

ACCEPTED BY:

Alpine County Unified School Client and Office
of Education

Authorized Signature

Date: _____

Below are fee estimates for the services outlined:

Proposed Service	Estimate
State Funding Eligibility	\$5,000 initial determination \$3,500 per annual update
Assist with Application for Financial Hardship Status	\$6,500 per submittal \$3,000 per re-review submittal
Assist with California Department of Education plan approval(s) requests	\$6,000 per application
Prepare and submit funding applications for New Construction projects to the Office of Public School Construction	\$12,000 per application
Prepare and submit funding applications for Modernization projects to the Office of Public School Construction	\$10,000 per application