



Professional Consulting Services Proposal

Prepared for:

Dixie School District

for

Fiscal Year 2019-20

Attention:

Dr. Jason Yamashiro

Superintendent

Email: jyamashiro@dixieschooldistrict.org

Phone: 415.492.3700

Primary Contact:

Jamie Iseman

Vice President

Email: jamie@kinginc.com

Phone: 916.382.9414



Experience and Qualifications

Firm Information

King Consulting is an established and recognized school facility planning firm. We offer a wide array of services to assist school districts of all sizes across California and the nation with their school planning needs and funding opportunities. Our work includes the completion of long range master plans, boundary studies, demographic studies, enrollment projection studies, developer fee justification studies, school facilities needs analysis studies, and State eligibility and funding applications. For the past twenty-five years, King Consulting has worked with clients throughout California and the nation.

Our professional, enthusiastic staff has over 70 years of combined experience in capital facilities funding, demographic research, and long-range facility planning. We are a small firm, with only highly experienced staff who excel in their specific areas of expertise. Our combined experience has resulted in our firm's ability to adhere to timelines and organize projects so that the client's needs are exceedingly met. While we specialize in managing and summarizing complex data analyses, we pride ourselves on our unique ability to disseminate the information to our clients and their stakeholders. We are always excited for the opportunity to meet in person or over the phone to clearly explain anything needed to our clients' staff, school board, and community. Our clients receive information within a broader context that includes full narrative explanations that school district staff and school board members repeatedly reference throughout the year.

When we work for our clients to obtain State funding they are assured that King Consulting has exhausted every possibility before submitting impeccably prepared documents that deliver maximum returns. We take the time to approach capital facilities programs or individual facility projects from multiple angles before pursuing the right one for each client individually, which often entails combining various funding mechanisms to maximize opportunity. Our staff works closely with District personnel to identify all potential funding sources, assists in the application process, and works with District staff and architects through project closeout. Furthermore, King Consulting has well-established critical relationships with all relevant State agencies (Office of Public School Construction, California Department of Education, etc.). Combined, our work experience has resulted in over \$1billion in State funding for our districts.

Finally, we are most proud of the lasting relationships we form with our clients. We care about our school districts, and we get to know them intimately through the course of our work. For this reason, so many of our clients work with us year after year: King Consulting digs deeper and tries harder in every aspect of our work because we become personally invested in the districts with whom we work.

Thank you for the opportunity to submit this proposal.



Scope of Service

This document represents an agreement between **Dixie School District** herein referred to as the Client, and **King Consulting**, herein referred to as the Contractor.

For the compensation stipulated, the Contractor shall provide the following services:

Review, prepare and submit documentation required to maximize the District's New Construction and Modernization eligibility under the State School Facility Program:

1. Obtain from the District facilities and enrollment information required to determine the amount of state modernization and new construction grant funding eligibility under the State School Facility Program.
 - a. Review and compile current CalPADS enrollment data.
 - b. Prepare State enrollment projections using all available methodologies to ensure maximum eligibility is captured:
 - i. 5-Year Projection
 - ii. 10-Year Projection
 - iii. Modified and Alternative Weighting Mechanisms
 - iv. Birth Rate Adjustment (County & Zip Code)
 - v. Dwelling Unit Research and Augmentation
 - vi. Student Yield Factor Review
2. Review site diagrams for square footage, classroom counts, age of facilities. Prepare and update facility capacity database annually to include any new additional facilities.
3. Prepare required enrollment and facilities reports for District review and approval to file with the Office of Public School Construction to seek approval of Modernization and New Construction eligibility. Prepare annual updated enrollment and facilities reports as needed or required.
4. Secure State Allocation Board approval of District's eligibility.



Prepare and submit State Allocation Board applications for New Construction and Modernization projects to the Office of Public School Construction as determined by the identified funding opportunities.

1. Work with the District staff, project managers, architects, and applicable State agency representatives to advance the District's applications and to establish timelines for completion of plans and State agency approvals to maximize the opportunity for funding approvals and meet the construction timelines and financial needs of the District.
2. Assist District with determination of project scope in order to secure maximum project eligibility and funding approvals.
3. Complete application for funding for District review and approval.
4. Assist the District in securing timely State Allocation Board funding approval upon filing Division of State Architect and California Department of Education approved final project plans with Office of Public School Construction.

Other Facility Program Funding Options

1. Assist with the preparation and submittal of California Department of Education plan approval requests.
2. Assist the District with planning services, as requested by the District, and as accepted by King Consulting.



Consulting Fees

For the services outlined the Client shall pay King Consulting on a time and material basis at the hourly rate of \$165.00. Fee estimates for services are outlined below. King Consulting will bill the Client in increments of 15 minutes, and invoice on a monthly basis. The fees shall cover all normal business expenses incurred on behalf of the Client. Necessary visitations to the District by the Consultant will be reimbursed on an actual and necessary basis. Reimbursed visitations shall have prior approval from the District.

The scope of the work necessary to complete the services listed in this Agreement is dependent on the availability and quality of the District's enrollment and facilities information and subject to SB 50 regulations.

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.

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

Additional Considerations

The Consultant shall be reimbursed as follows:

1. Reproduction of documents shall be the responsibility of the District. If the District chooses, the Consultant will provide duplicating services on an actual cost basis.
3. Application filing fees and other state required fees are the responsibility of the District.

Submitted by: King Consulting _____ — Authorized Signature Date:	Accepted by: Dixie School District _____ Authorized Signature Date:
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Fee Estimates

State Funding Eligibility:

50 hours per annual update

School Facility Program Application Services:

Assist the District with obtaining California Department of Education approval for SFP funding applications

20 hours per application

Prepare and submit funding applications for New Construction projects to the Office of Public School Construction

50 hours per application

Prepare and submit funding applications for Modernization projects to the Office of Public School Construction

40 hours per application



References

Chico Unified School District (14,228 students)

163 E. 7th St.
Chico, CA 95928

King Consulting has worked as the primary consultant for Chico Unified School District since 2004, preparing Demographic Analysis and Student Housing reports annually, assisting with and maximizing State School Facility Program eligibility and funding applications, and preparing boundary realignment studies as needed. We are currently contracted for various projects, including State School Facility Program assistance and boundary realignment.

Contact:

Julie Kistle, Director, Facilities and Construction. Phone: 530-891-3410

Ross Valley Elementary School District (2,094 students)

110 Shaw Dr.
San Anselmo, CA 94960

King Consulting has worked as the sub-consultant and, more recently, the primary consultant for Ross Valley Elementary School District since 2008, preparing Facility Master Plans, Boundary Studies, annual Enrollment Projection studies, Developer Fee Studies, and assisting with and maximizing State School Facility Program eligibility and funding applications and State Allocation Board appeals. Our contracts are ongoing. We are currently contracted for various projects, including a Developer Fee Justification study, a Demographic Analysis, and State school Facility Program assistance.

Contact:

Midge Hoffman, Chief Business Official. Phone: 415-451-4075

Napa Valley Unified School District (18,093 students)

2425 Jefferson St,
Napa, CA 94558

King Consulting has worked as the sub-consultant for Napa Valley Unified School District since 2004, preparing annual Demographic Analysis & Enrollment Projection Studies, Developer Fee Studies, Boundary Studies, and assisting with and maximizing State School Facility Program eligibility and funding applications. We are currently contracted for a multitude of services, including several State School Facility Program Facility Hardship projects.

Contact:

Jennifer Gibb, Facilities Financial Analyst. Phone: 707-253-6281