



# **TRUSTEE AREA DEMOGRAPHY SERVICES**

**TRACY UNIFIED SCHOOL DISTRICT**

**JANUARY 18, 2023**





## WHAT WE STAND FOR

Cooperative Strategies believes in a future where education—for everyone—is thriving.

We envision a world where students, teachers, and administrators are excited to go to school, feel safe in their buildings, and come home inspired as a result. And we stand side by side with school districts and their communities to make this dream a reality.

The Cooperative Strategies approach is different because it's holistic. Our team guides school districts through every turn of their educational planning journey, helping them:


**Assess where they are** by examining facility conditions, educational adequacy, and building capacity

**Plan where they want to go** by creating master strategies and studies that align their priorities with community needs

**Fund their dreams** by evaluating financial opportunities and securing cost-effective financing

**Build their vision** by managing facility and program projects through to completion



The background of the image shows three yellow school buses parked in a row on a grassy field. The sky is filled with large, white, fluffy clouds. The entire image has a dark, semi-transparent overlay to make the white text stand out.

# YOUR TEAM *EVERY STOP* ALONG THE WAY

THE CS BUS ROUTE 

# THE CS BUS ROUTE

## ASSESS

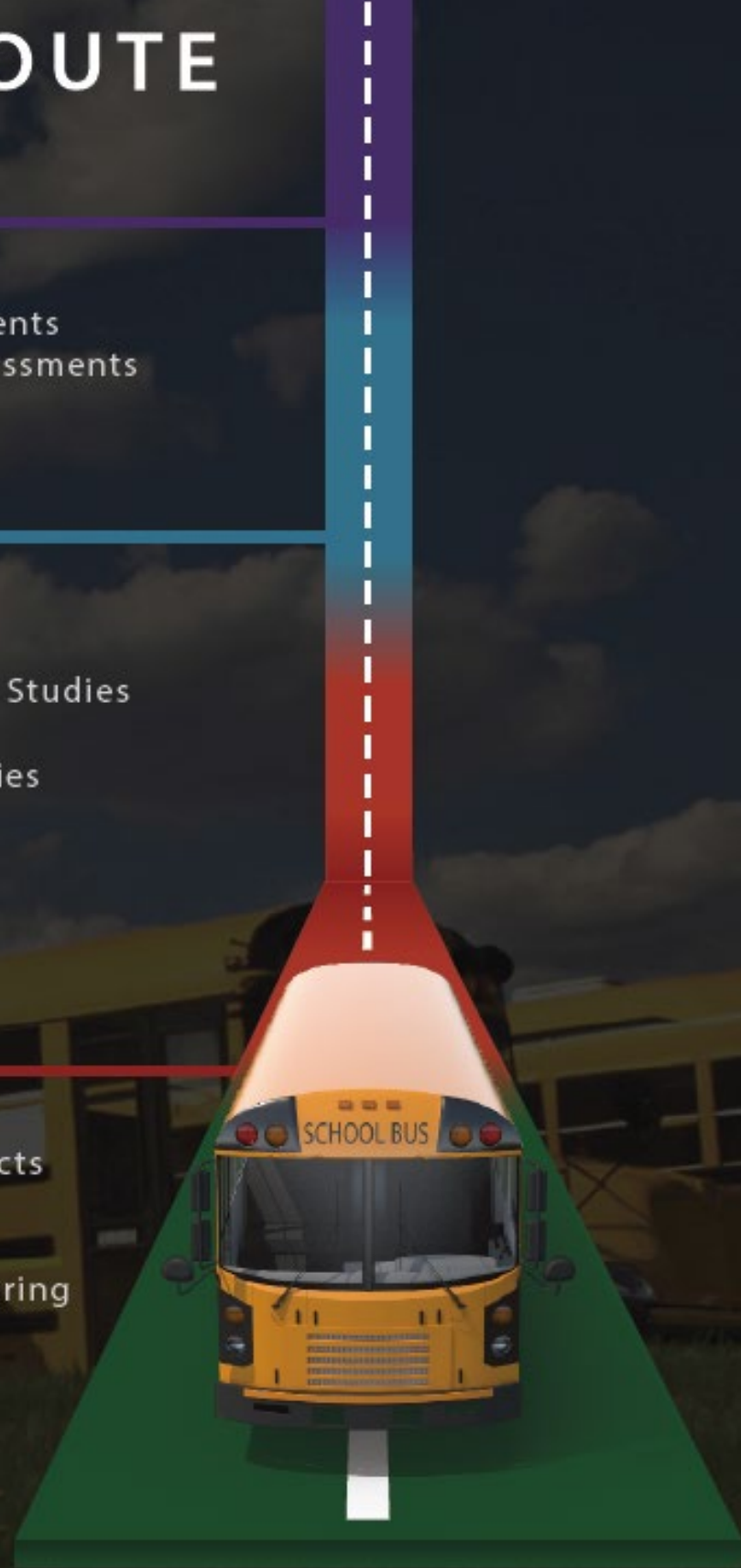
- Facility Condition Assessments
- Educational Adequacy Assessments
- Capacity Analyses

## PLAN

- Master Plans
- Strategic Plans
- Enrollment & Demographic Studies
- Housing Studies
- Attendance Boundary Studies
- Redistricting Studies
- Voting Area Creation
- Other Studies
- Community Engagement

## FUND

- Community Facilities Districts
- Funding Plans
- General Obligation Bonds
- Debt Refunding / Restructuring
- Special Tax Bonds



Navigating your educational and facilities planning journey is no easy task, but you don't have to do it alone. From initial **assessment** and **planning**, to project **funding** – we'll help you create a unified strategy to stay on track. And we'll be with you *every stop along the way.*

# LETTER OF INTEREST

**William B. Tunick**

**Attorney at Law**

Dannis Wolver Kelly

200 California Street, Suite 400

San Francisco, CA 94111

1/18/2023

## **Re: Proposal to Provide CVRA Transition Services**

Dear Mr. Tunick:

Cooperative Strategies, LLC (CS) is pleased to submit the enclosed proposal to provide a liability study and/or transition process services in compliance with the California Voting Rights Act ("CVRA") to Dannis Wolver Kelly on behalf of Tracy Union School District ("TUSD" or "the District").

Throughout the past 25+ years, Cooperative Strategies has helped plan and finance school facilities for more than 2,000 school districts across the nation. Our philosophy is to provide **relationship-based** consulting services primarily to school districts. We believe it is important to thoroughly understand our clients' specific needs, and we pride ourselves on building lasting partnerships that help them achieve their long-term goals and objectives.

We are unique in that we offer a spectrum of services, from initial assessment and planning through funding and final construction. Our integrative model merges demographic information, conditional needs, educational goals, and funding ability. This gives both our staff and our clients a "Full Picture" of the District's needs. Our proposed staff will be ready and willing to work with the District throughout the dates presented by counsel.

Given our expertise in analyzing and evaluating demographic data, CS is uniquely qualified to assist the School District with demographic services in relation to compliance with the CVRA. We've provided similar services to more than 165 districts across the State of California ("State") which makes us intimately familiar with the requirements under the CVRA and the Federal Voting Rights Act ("FVRA").

Thank you for the opportunity to submit the enclosed proposal. Should you have any questions, please do not hesitate to contact me. We look forward to the prospect of working with TUSD!

Sincerely,



Angela Banuelos

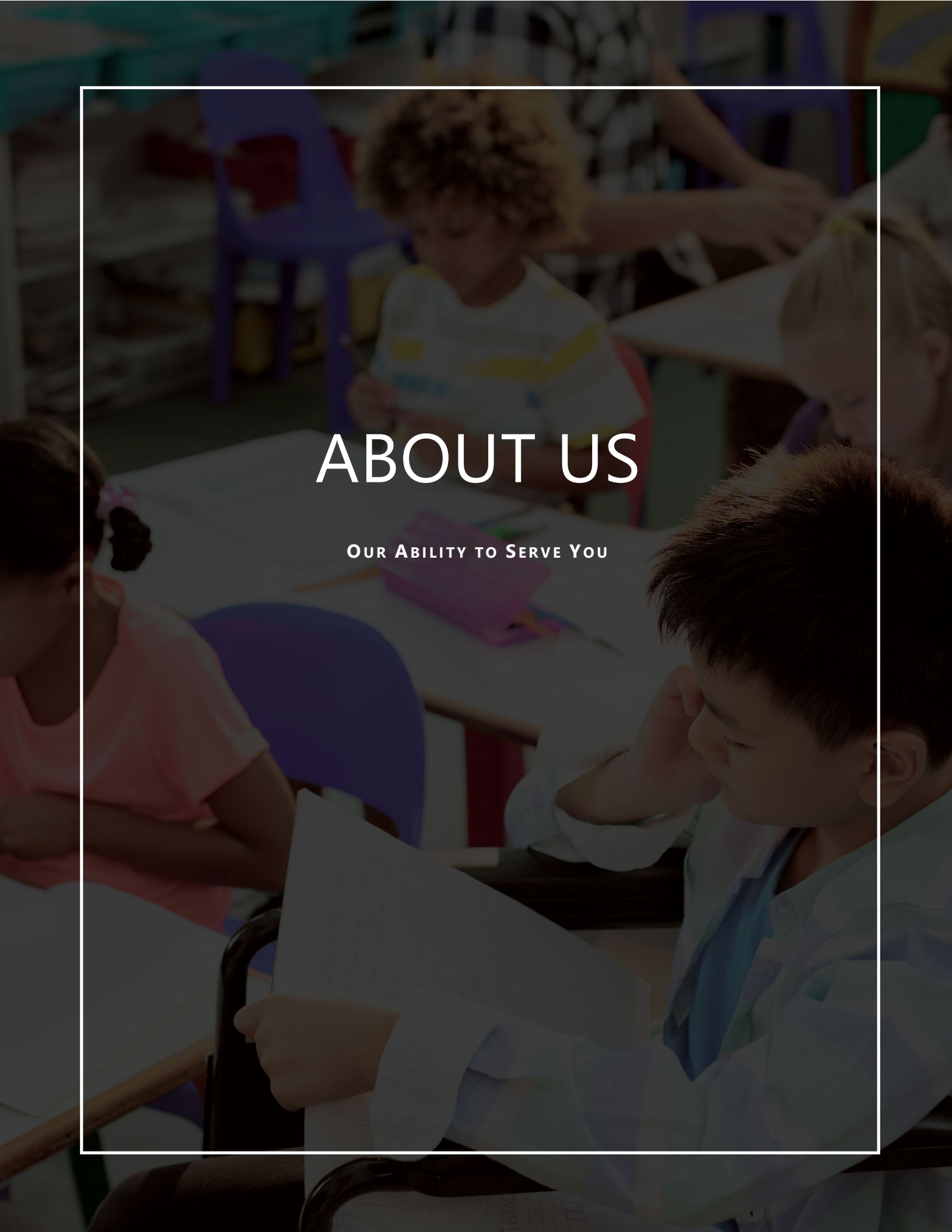
Senior Associate Director

949.250.8353 | [abanuelos@coopstrategies.com](mailto:abanuelos@coopstrategies.com)

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A photograph of children in a classroom, with a boy in the foreground looking at a paper. The image is darkened and has a white border.

# ABOUT US

OUR ABILITY TO SERVE YOU



## WHO WE ARE

We are a tightknit team of educational facility and program planners with backgrounds in school facility management, educational program planning, 21st Century Learning principles, GIS, engineering, capital planning, and community engagement. Our team members include: former state department of education thought leaders; former school superintendents, maintenance managers, teachers, and administrators; Association for Learning Environments members; Recognized Educational Facility Planners; and MSRB Series 50 Municipal Advisor Representatives.

**We firmly believe that a thriving, equitable public education system is foundational to our democracy and our country's vitality.**

## WHY COOPERATIVE STRATEGIES?

**We are dedicated to strengthening our public school institutions at every level, every day.** Cooperative Strategies is working alongside the [Re]Build America's School Infrastructure Coalition, the National Council on School Facilities, and the Center for Cities + Schools [toward the passage of legislation](#). We facilitate regular webinars where K12 thought leaders collaborate on how to equitably and safely educate all students. We sponsor conferences led by organizations like the Coalition for Adequate School Housing and the Council of Great City Schools.

**As your needs evolve, so do our offerings.** From initial building and standards assessments, to facility and demographic planning, to financial advisory services, to full program management—we partner with school districts throughout their entire journeys.

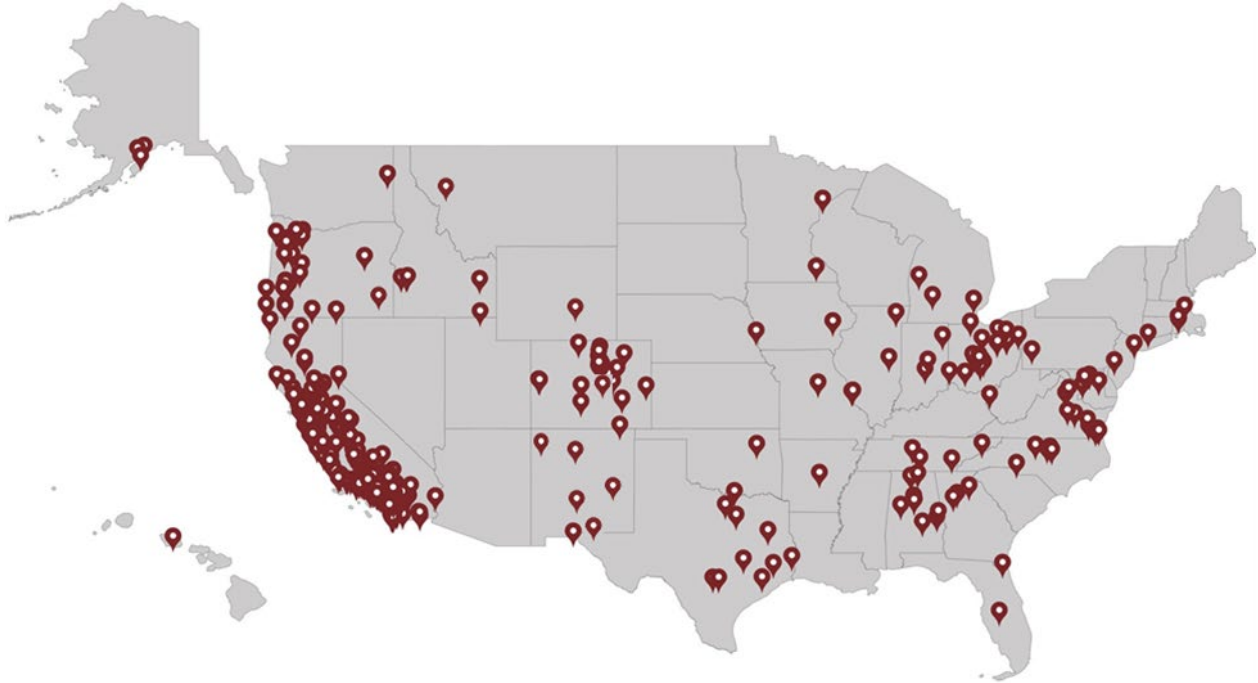
**For us, it's all about relationships.** We know that one size does not fit all, especially when it comes to planning educational facilities. Our team works hard to understand each district's goals and objectives and to become a trusted extension of their staff. Many school districts have been clients for upwards of 20 years—our approach is about building lasting partnerships.



## NATIONWIDE EXPERTISE

We guide school districts of all shapes and sizes through projects of all shapes and sizes. Our expertise across the facility and educational planning process means districts do not need to hire multiple firms from various industries.

Our team listens to administrations' hopes and communities' concerns. We partner with school boards to help build stakeholder consensus. And we work with developers and designers to execute schools' visions.



With thousands of success stories across the U.S. and beyond, we easily adapt to regional laws and regulations.

Our team members spread throughout the country—in **California, Colorado, Iowa, Ohio, New York, Texas, and Virginia**—enable us to offer nimble, cost-effective solutions to clients regardless of their location or time zone.

## OUR ACCOMPLISHMENTS

2,000+ School  
Districts  
Served

15 Billion+  
Dollars in  
Bonds

20+  
Service  
Lines



300+  
Facilities  
Master Plans



200 Million  
Dollars in  
Owner's Rep.

100 Million+  
Sq. Ft. of  
Schools  
Assessed

3,000+  
Enrollment  
Projections

25+ Years of  
Experience



Multiple  
Series 50  
Qualified  
Municipal  
Advisors



280+  
Educational  
Specifications

SaaS  
Offerings  
Including  
My Facility  
Informer™

4 U.S. Office  
Locations



An aerial photograph of a residential neighborhood, showing a grid of streets, numerous houses with red and brown roofs, and green trees. The image is used as a background for a document cover.

# SCOPE OF SERVICES

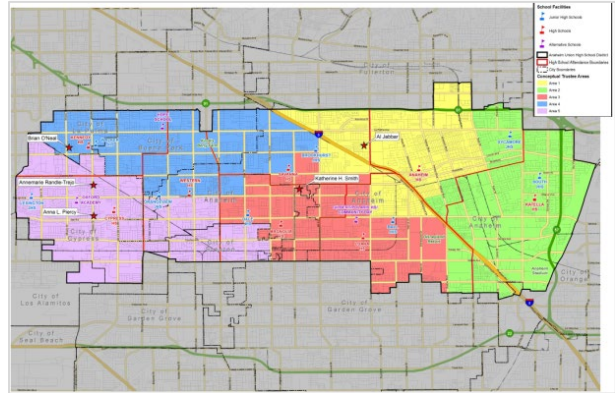
TRUSTEE AREA DEMOGRAPHY SERVICES



## TRUSTEE AREA CREATION

We have assisted a number of districts throughout California with the creation and implementation of voting areas. When drawing trustee areas, we utilize the following legal considerations:

- Each area shall contain nearly equal number of inhabitants based on total population with a variance of up to 10 percent between the largest and smallest areas
- Comply with the FVRA in that members of a protected class do not have their voting rights diluted through the creation of voting areas
- Be compact and contiguous, as much as possible
- Follow man-made and natural geographic features, as much as possible
- Respect incumbency where possible
- Consider other local criteria



Once several maps that meet the above criteria are created, we review them with TUSD staff and legal counsel to ensure legal compliance. The maps are then shared with the governing board for review and comment prior to receiving public input.



Public input can take the form of public hearings at board meetings or in town hall meetings across the District where community members can review the information and provide feedback.

After all feedback is compiled, the governing board can adjust the maps as it desires before ultimately deciding on the map that best meets the needs of the community. Our team then helps with the approval and adoption process to finalize and implement the new trustee area election method.

## APPROACH

Our approach to creating trustee areas is multi-layered, beginning with data driven options refined by public input and feedback from the Board. Below we highlight some of the important aspects of our approach that make us a good candidate for this engagement:

- Objective Approach: we approach each engagement without preconceived notions of what the outcome should be. This allows us to listen to priorities, concerns and input from community members and stakeholders to develop scenarios that best serve the interests of the community.
- Public Agency Focus: we only work with public agencies, which frees us from some of the conflicts of interest that other consultants may have. We **do not** serve political candidates for office, political party organizations or advocacy groups, which we believe helps to maintain our independence and objectivity. We put public agencies' interests first in all of the work we do, and we take tremendous pride in that.
- Education Experience: we have been providing services to LEAs in California for more than 20 years. We understand the environment our clients operate in and bring unique perspective of the practical impacts of our work and recommendations. Each of our clients has unique circumstances, and we apply the lessons learned from working with more than 165 LEAs across the State on their trustee areas.

## ANALYTICAL RESOURCES

Our firm has experience utilizing Geographic Information Systems ("GIS") software for the better part of two decades.

- We have more than 10 GIS professionals that are highly skilled in conducting geospatial analyses needed to provide redistricting consulting services. In addition to providing redistricting services, our GIS professionals do many other geospatial analyses to support our clients.
- We utilize the most up to date ESRI software.
- We pair our GIS capabilities with extensive research experience where we are skilled at tracking down the most relevant GIS shapefiles and demographic datasets.
- We can also provide a web-based tool for members of the community and stakeholders to provide scenarios or revise map options, if desired.
- Quantitative analysis for LEAs is our specialty and we have the tools and staff capabilities to facilitate the redistricting process for TUSD.
- Over the last 10-plus years, we have developed proprietary models to perform the analyses needed to advise TUSD on issues related to the CVRA, and we can quickly and efficiently analyze different scenarios to meet the compressed timelines resulting from delays in the release of Census data.
- Our experience has shown us that understanding the relevant data is only part of our role. We have learned that listening to our clients' goals and priorities will help us to

support the decision-making process. As a result, we can modify and adapt our analyses to suit the specific needs of our clients.

Our quantitative capabilities combined with our extensive experience ensures that we look at the issues from all perspectives and will create an outcome that is thoughtful and in the best interests of the community.

## PUBLIC OUTREACH

We pride ourselves on our ability to lead and facilitate public outreach for our clients. In addition to public outreach for trustee areas, we have led public outreach processes for LEAs across the nation related to facilities master plans, school attendance boundaries and school closures. We help to educate stakeholders about the issues and provide a forum for community input. For TUSD, our proposed process would include the following:

- Public Hearings (required by statute): once conceptual trustee areas have been refined, we would present preliminary scenarios during public hearings at TUSD Board meetings and gather input received from stakeholders.
- Community Input Meetings (Optional): following public hearings on the initial scenarios, we would lead and facilitate community input meetings with the goal of educating community members, responding to questions and gathering input. We prepare an informational presentation, handouts with maps and data, and record questions/concerns/recommendations on comment forms. We synthesize this input and report back to administrators and the Board.
- Trustee Area Website (Optional): based on TUSD's preference, we can either create a dedicated website for the trustee area process or coordinate the content for a page on the School District's website. This would include posting relevant background information on the process, agendas and Board presentations, information from community input meetings, and an online mapping tool, if desired (see below).
- Online Mapping Tool (optional): we can also provide an online tool for members of the community and stakeholders to provide scenarios or revise map options, if desired. This supplements the community input process and allows the public to provide tangible recommendations.
- Final Board Recommendations: the goal of the public outreach process is to provide transparency for the process, engage the community in a dialogue about relevant issues and refine final recommendations to the Board. We can best support the Board's decision-making process by facilitating communication with stakeholders and adjusting our recommendations accordingly.



## STATEMENT OF WORK

### ACTIVITY I. GOALS AND PRIORITIES AND DATA ANALYSIS

#### **Task 1 Identify Goals and Priorities**

This task involves determining the goals the District has for the redistricting process. This determination will be based on Education Code and Elections Code, including the California Voting Rights Act and Federal Voting Rights Act. Goals and priorities may or may not take into account:

- Balanced Population (One Person, One Vote)
- Civic Boundaries
- Community Identity

#### **Task 2 Identify Key Issues and Considerations**

This task involves identifying the key issues and considerations involved in creating Trustee Areas. These may include legal issues, compliance with federal and State regulations, Committee on School District Organization and State Board of Education requirements, and constituent/community concerns, as well as others.

#### **Task 3 Discuss Requirements with Legal Counsel**

This task involves discussing the list of items identified in Tasks 1 and 2 with staff of the District and the Client to ensure compliance with all applicable legal, statutory, and organizational requirements.

#### **Task 4 Prepare Census Data Analysis for Trustee Areas**

This task involves analyzing 2020 Census data to obtain information on population within the District as well as to use in creating conceptual Trustee Areas.

#### **Task 5 Evaluate Population of Community**

This task involves evaluating the demographics of the District based on data from the United States Census.

#### **Task 6 Attend and Present at Public Hearings**

This task involves Cooperative Strategies attending and presenting at the two (2) pre-map public hearings at meetings of the Governing Board of the School District to gather input from the community and Governing Board.

**ACTIVITY II. PREPARE AND PRESENT SCENARIOS****Task 7 Create Conceptual Trustee Areas**

This task involves using Census data and GIS data gathered in Task 4 and input received in Task 6 to prepare three (3) conceptual Trustee Area scenarios. This task will involve preparing alternative Trustee Area boundary proposals for consideration, including maps and demographic data for comparative purposes.

**Task 8 Present Recommendations to Staff**

This task involves presenting conceptual Trustee Areas to District staff for their review and consideration. CS will prepare deliverables and a presentation with the goal of refining the recommendations that will be delivered to the Board.

**Task 9 Present to Governing Board**

This task involves three (3) meetings to present the scenarios from Task 8 to the Board for comment and review. These meetings include the public hearings required prior to approval by the Governing Board.

**Task 10 Assist in Public Outreach**

At the District's request, this task involves assisting in a public outreach effort to present conceptual scenarios to the public and solicit feedback from constituents on the scenarios through participation in community input meetings. Cooperative Strategies will provide materials for meetings and assist in coordinating a transparent process to gather and respond to feedback.

**Task 11 Revise Scenarios**

This task involves revising the conceptual scenarios based on feedback from the public and the Board.

**Task 12 Present Revised Scenarios to Governing Board**

This task involves presenting the revised scenarios to the Board for consideration and approval of new Trustee Areas.

**Task 13 Assist in Approval and Implementation Process**

This task involves assisting in obtaining approval of Trustee Areas from the County Committee on School District Organization. CS will provide these organizations with supporting data/information and answer questions on behalf of the District. CS also will assist with approval of an election waiver from the State Board of Education and ensure proper documentation is provided to State and County offices to implement the change in Trustee Areas.

**Optional      Community Input Meetings**

At the District's request and for an additional fee outlined in Exhibit B, this task involves the facilitation of community input meetings with the goal of educating constituents, responding to questions and gathering input from constituents. CS will provide an informational presentation, handouts with maps and data, and record questions/concerns/recommendations on comment forms. CS will present findings at



A photograph of a classroom scene. In the foreground, a man with short dark hair, wearing a light-colored long-sleeved shirt and grey jeans, is sitting on the edge of a desk. He is holding a tablet computer in his hands and looking towards a group of students. In the background, several young students are seated at their desks. A girl with blonde hair is looking towards the man, and a boy next to her is smiling. The classroom has a bulletin board with various papers and decorations on the wall. The overall image has a dark, semi-transparent overlay.

# KEY PERSONNEL

YOUR TEAM OF INDUSTRY EXPERTS



**ANGELA BANUELOS**  
**SENIOR ASSOCIATE DIRECTOR**

Angela Banuelos has been assisting LEAs with a variety of services since joining Cooperative Strategies in 2016. Angela is currently a member of our Planning Department, where she completes California Voting Rights Act ("CVRA") analyses, redistricting, and assists school districts and other public agencies with the transition from at-large election systems to by-area election systems.

Angela also oversees the firm's *DisclosureCompliance™* platform. In that capacity, Angela is responsible for monitoring school districts' and cities' continuing disclosure obligations related to SEC Rule 15c2-12 and annual continuing disclosure reports for outstanding issuances.

### Education

B.A., Political Science, California State University, Fullerton

### Areas of Expertise

- Disclosure Compliance Services
- Geographic Information Systems
- Trustee/Voting Areas
- Redistricting
- Facility Condition Assessment
- Education Adequacy Assessment
- Enrollment Projections
- Facility Master Plans

### Notable Accomplishments

- Project Management Institute (PMI) Member

### Sample Experience

**Anaheim Elementary School District, Ca**  
*Trustee/Voting Areas*

**Anaheim Union High School District, CA**  
*Trustee/Voting Areas*

**Bear Valley Unified School District, CA**  
*Trustee/Voting Areas*

**Brea-Olinda Unified School District, CA**  
*Trustee/Voting Areas, Redistricting*

**City of Beverly Hills, CA**  
*Disclosure Compliance Services*

**Colorado Springs School District, CO**  
*Education Adequacy Assessment*

**Corona-Norco Unified School District, CA**  
*Disclosure Compliance Services*

**Duarte Unified School District, CA**  
*Trustee/Voting Area*

**Escondido Union School District, CA**  
*Disclosure Compliance Services, Redistricting*

**Escondido Union High School District, CA**  
*Disclosure Compliance Services*

**Fillmore Unified School District**  
*Trustee/Voting Areas*

**Fullerton School District, CA**  
*Disclosure Compliance Services, Trustee/Voting Areas, Redistricting*

**Galt Joint Union High SD, CA**  
*Trustee/Voting Areas*

**Garvey School District, CA**  
*Trustee/Voting Areas*

**Hesperia Unified School District, CA**  
*Mitigation Negotiation Services, Disclosure Compliance Services*

**Hitchcock Independent School District, TX**  
*Facility Condition Assessment*

**Jefferson School District, CA**  
*Disclosure Compliance Services*

**Lake Elsinore Unified School District, CA**  
*Disclosure Compliance Services*

**Long Beach Community College District, CA**  
*Disclosure Compliance Services*

**Menifee Union School District, CA**  
*Disclosure Compliance Services*

**Newport Mesa Unified School District**  
*Trustee/Voting Areas*

**Ontario-Montclair School District, CA**  
*Trustee/Voting Areas*

**Rowland Unified School District, CA**  
*Trustee/Voting Areas*

**San Marcos Unified School District, CA**  
*Disclosure Compliance Services*

**Santa Ana Unified School District**  
*Trustee/Voting Areas*

**Santa Clarita Community College District**  
*Trustee/Voting Areas*

**Savanna School District, CA**  
*Trustee/Voting Areas*

**South Whittier School District, CA**  
*Trustee/Voting Areas*

**Sunnyvale School District, CA**  
*Trustee/Voting Areas*

**Woodland Joint Unified School District, CA**  
*Disclosure Compliance Services*



## **CYNTHIA CASAREZ**

### **ASSOCIATE**

Cynthia Casarez has provided a variety of services since joining Cooperative Strategies in 2018. Cynthia is currently a member of our Planning Department, where she completes various demographic analyses and cartographic services.

Cynthia also specializes in a variety of Geographic Information Systems (GIS) tasks which include data analysis. She also assists with report generating and enrollment projections.

### **Education**

B.S., Geography with Emphasis in GIS,  
California State Polytechnic University, Pomona

M.S., Geographic Information Science,  
California State University, Long Beach

### **Areas of Expertise**

- Data extraction
- Developer Fee Justification Studies
- Enrollment Projections
- Geographic Information Systems
- GIS data compilation and analysis
- School Facilities Needs Analysis
- Trustee/Voting Areas

### **Sample Experience**

**Anaheim Elementary School District, CA**  
*Developer Fee Studies, Trustee/Voting Areas*

**Bear Valley Unified School District, CA**  
*Trustee/Voting Areas*

**Brea-Olinda Unified School District, CA**  
*Trustee/Voting Areas*

**Community Consolidated School District 21, IL**  
*Enrollment Projections, Subdivision Yield Analysis*

**Corona-Norco Unified School District, CA**  
*Cartographic work for CFDs*

**Fillmore Unified School District**  
*Trustee/Voting Areas*

**Garvey School District, CA**  
*Trustee/Voting Areas*

**Heath School District, OH**  
*Enrollment Projections, Student Potential Analysis*

**Indian Hill Exempted Village School District, OH**  
*Enrollment Projections*

**Myrtle Point School District, OR**  
*Enrollment Projections*

**Natomas Unified School District, CA**  
*School Facilities Needs Analysis*

**Ontario-Montclair School District, CA**  
*Developer Fee Studies*

**Rowland Unified School District, CA**  
*Trustee/Voting Areas*

**San Marcos Unified School District, CA**  
*Cartographic work for CFDs*





# PAST PROJECTS

PROVEN SUCCESS STORIES



## SAMPLE TRUSTEE AREA CREATION SERVICES CLIENTS

In assessing the data of our clients under the CVRA and FVRA, Cooperative Strategies has worked with a number of districts that have taken different paths in the by-area voting transition process. The majority of our clients have proceeded in this endeavor through legal counsel and engaged our services under attorney-client privilege. All work products remained confidential and all communication with the governing board on these topics was done in a closed session.

For this reason, Cooperative Strategies cannot disclose the full list of clients who engaged our services under this type of arrangement. These clients included districts where we identified potential litigation of trustee areas under the FVRA and CVRA.

A list of some of the districts we have previously provided similar services to is found on the following table.

District Name	Location	Service Type
Adelanto Elementary School District	San Bernardino County	Trustee Area Creation Services
Alhambra Unified School District	Los Angeles County	Trustee Area Creation Services
Alta Loma School District	San Bernardino County	Trustee Area Creation Services
Alvord Unified School District	Riverside County	Trustee Area Creation Services
Anaheim Elementary School District	Orange County	CVRA Analysis & Trustee Area Creation Services
Anaheim Union High School District	Orange County	Trustee Area Creation Services
Antelope Valley Union High School District	Los Angeles County	Trustee Area Creation Services
Antioch Unified School District	Contra Costa County	Trustee Area Creation Services
Apple Valley Unified	San Bernardino County	Trustee Area Creation Services

District Name	Location	Service Type
School District		
Aromas-San Juan Unified School District	San Benito County	Trustee Area Creation Services
Atascadero Unified School District	San Luis Obispo	Trustee Area Creation Services
Azusa Unified School District	Los Angeles County	Trustee Area Creation Services
Banning Unified School District	Riverside County	Trustee Area Creation Services
Bear Valley Unified School District	San Bernardino County	Trustee Area Creation Services
Beaumont Unified School District	Riverside County	Trustee Area Creation Services
Benicia Unified School District	Solano County	Trustee Area Creation Services
Bonita Unified School District	Los Angeles County	Trustee Area Creation Services
Bonsall Unified School District	San Diego County	Trustee Area Creation Services
Briggs Unified School District	Ventura County	Trustee Area Creation Services
Charter Oak Unified School District	Los Angeles County	Trustee Area Creation Services
Copper Mountain Community College District	San Bernardino County	Trustee Area Creation Services
City of Garden Grove	Orange County	CVRA Analysis & Trustee Area Creation Services

<b>District Name</b>	<b>Location</b>	<b>Service Type</b>
Conejo Valley Unified School District	Ventura County	Trustee Area Creation Services
Corona-Norco Unified School District	Riverside County	Trustee Area Creation Services
Davis Joint Unified School District	Yolo County	Trustee Area Creation Services
Desert Sands Unified School District	Riverside County	Trustee Area Creation Services
Diablo Water District	Contra Costa County	Trustee Area Creation Services
Dos Palos Oro Loma Joint Unified School District	Merced & Fresno County	Trustee Area Creation Services
Dublin Unified School District	Alameda County	Trustee Area Creation Services
Duarte Unified School District	Los Angeles County	Trustee Area Creation Services
East Orange County Water District	Orange County	Trustee Area Creation Services
Etiwanda School District	San Bernardino County	Trustee Area Creation Services
Fallbrook Union High School District	San Diego County	Trustee Area Creation Services
Fillmore School District	Ventura County	Trustee Area Creation Services
Fontana Unified School District	San Bernardino County	Trustee Area Creation Services
Fullerton School District	Orange County	Trustee Area Creation Services

<b>District Name</b>	<b>Location</b>	<b>Service Type</b>
Galt Joint Union High School District	Sacramento County	Trustee Area Creation Services
Garden Grove Unified School District	Orange County	Trustee Area Creation Services
Garvey Unified School District	Los Angeles County	Trustee Area Creation Services
Goleta Union School District	Santa Barbara County	Trustee Area Creation Services
Hacienda La Puente Unified School District	Los Angeles County	Trustee Area Creation Services
Hemet Unified School District	Riverside County	Trustee Area Creation Services
Hesperia Unified School District	San Bernardino County	Trustee Area Creation Services
Hueneme Elementary School District	Ventura County	Trustee Area Creation Services
Imperial Valley Community College District	Imperial County	Trustee Area Creation Services
La Mesa-Spring Valley School District	San Diego County	Trustee Area Creation Services
Lincoln Unified School District	San Joaquin County	Trustee Area Creation Services
Mesa Union School District	Ventura County	Trustee Area Creation Services
Moorpark Unified School District	Ventura County	Trustee Area Creation Services
Moreno Valley Unified School District	Riverside County	Trustee Area Creation Services



District Name	Location	Service Type
Mountain View School District	San Bernardino County	Trustee Area Creation Services
Mt. Diablo Unified School District	Contra Costa County	Trustee Area Creation Services
Mupu Elementary School District	Ventura County	Trustee Area Creation Services
Natomas Unified School District	Sacramento County	Trustee Area Creation Services
North Orange County Community College District	Orange County	Trustee Area Creation Services
Novato Unified School District	Marin County	Trustee Area Creation Services
Oakley Union Elementary School District	Contra Costa County	Trustee Area Creation Services
Ocean View School District	Ventura County	Trustee Area Creation Services
Ojai Unified School District	Ventura County	Trustee Area Creation Services
Ontario-Montclair School District	San Bernardino County	Trustee Area Creation Services
Orcutt Unified School District	Santa Barbara County	Trustee Area Creation Services
Oroville Union High School District	Butte County	Trustee Area Creation Services
Oxnard School District	Ventura County	CVRA Analysis & Trustee Area Creation Services
Oxnard Union High School District	Ventura County	Trustee Area Creation Services

District Name	Location	Service Type
Palm Springs Unified School District	Riverside County	Trustee Area Creation Services
Paso Robles Union High School District	San Luis Obispo County	Trustee Area Creation Services
Perris Elementary School District	Riverside County	Trustee Area Creation Services
Petaluma City Schools	Sonoma County	Trustee Area Creation Services
Placer County Board of Education	Placer County	Trustee Area Creation Services
Pleasant Valley Unified School District	Ventura County	Trustee Area Creation Services
Port San Luis Harbor District	San Luis Obispo County	Trustee Area Creation Services
Redlands Unified School District	San Bernardino County	Trustee Area Creation Services
Rialto Unified School District	San Bernardino County	Trustee Area Creation Services
Rim of the World Unified School District	San Bernardino County	Trustee Area Creation Services
Rio School District	Ventura County	Trustee Area Creation Services
Riverside Community College District	Riverside County	Trustee Area Creation Services
Romoland School District	Riverside County	Trustee Area Creation Services
Rowland Unified School District	Los Angeles County	Trustee Area Creation Services
San Juan Unified School District	Sacramento County	Trustee Area Creation Services

<b>District Name</b>	<b>Location</b>	<b>Service Type</b>
San Mateo County Community College District	San Mateo County	Trustee Area Creation Services
San Miguel Unified School District	San Luis Obispo County	Trustee Area Creation Services
San Simeon Community Service District	San Luis Obispo County	Trustee Area Creation Services
Santa Ana Unified School District	Orange County	Trustee Area Creation Services
Santa Barbara Unified School District	Ventura County	Trustee Area Creation Services
Santa Clara Elementary School District	Ventura County	Trustee Area Creation Services
Santa Clara Unified School District	Santa Clara	Trustee Area Creation Services
Santa Maria-Bonita School District	Santa Barbara County	Trustee Area Creation Services
Santa Paula Unified School District	Ventura County	Trustee Area Creation Services
Santa Rosa City Schools	Sonoma County	Trustee Area Creation Services
Santa Ynez Union High School District	Santa Barbara County	Trustee Area Creation Services
Savanna School District	Orange County	Trustee Area Creation Services
Silver Valley Unified School District	San Bernardino County	Trustee Area Creation Services
Somis Union School District	Ventura County	Trustee Area Creation Services
Soquel Union Elementary School District	Santa Cruz County	Trustee Area Creation Services

<b>District Name</b>	<b>Location</b>	<b>Service Type</b>
Snowline Joint Unified School District	San Bernardino County	Trustee Area Creation Services
South Whittier School District	Los Angeles County	Trustee Area Creation Services
Sunnyvale Elementary School District	Santa Clara County	Trustee Area Creation Services
Temecula Valley Unified School District	Riverside County	Trustee Area Creation Services
Val Verde Unified School District	Riverside County	Trustee Area Creation Services
Vallecitos Elementary School District	San Diego County	Trustee Area Creation Services
Vallejo City Unified School District	Solano County	Trustee Area Creation Services
Victor Elementary School District	San Bernardino County	Trustee Area Creation Services
Victor Valley Union High School District	San Bernardino County	Trustee Area Creation Services
West Sonoma County Union High School District	Sonoma County	Trustee Area Creation Services
William S. Hart Union High School District	Los Angeles County	Trustee Area Creation Services
Wilsona School District	Los Angeles County	Trustee Area Creation Services





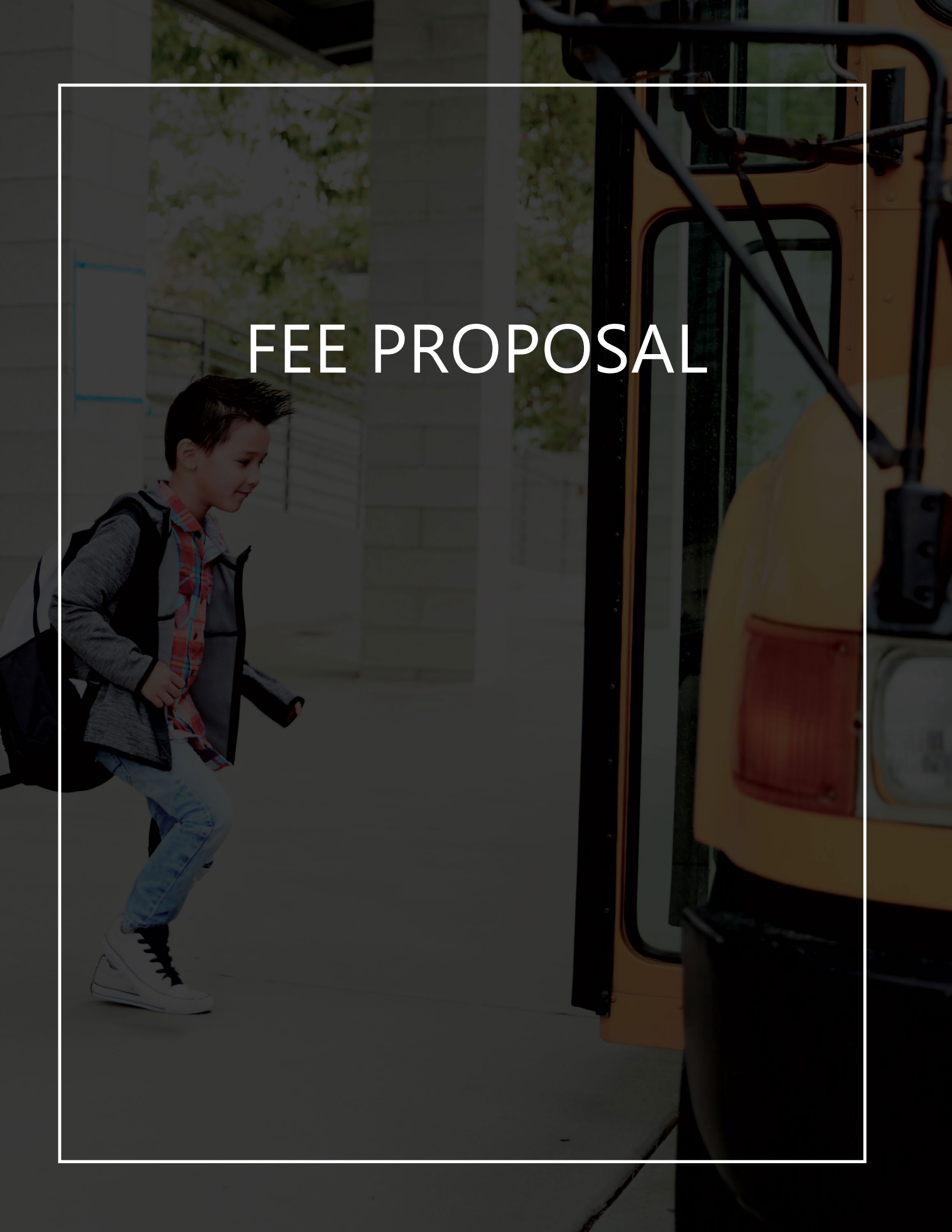
# REFERENCES

TRANSPARENCY IS TRUST

The best proof of our ability to deliver comes via the testimony of current and past clients. Below we provide contact information for our partners at K-12 school districts who can speak to our expertise, dedication, and commitment.

CLIENT	CONTACT INFORMATION
Sacramento County Office of Education	Tom Adams Support Operations Coordinator 916.228.2500 <a href="mailto:tadams@scoe.net">tadams@scoe.net</a>
Galt Joint Union High School District	Lisa Pettis Superintendent 209.745.3061 <a href="mailto:LPettis@ghsd.k12.ca.us">LPettis@ghsd.k12.ca.us</a>
Fillmore Unified School District	Christine Schieferle Superintendent 805.524.6038 <a href="mailto:christine.schieferle@fillmoreusd.org">christine.schieferle@fillmoreusd.org</a>
Oxnard Union High School District	Dr. Tom McCoy Superintendent 805.385.2527 <a href="mailto:thomas.mccoy@oxnardunion.org">thomas.mccoy@oxnardunion.org</a>
Santa Clara Unified School District	Mark Schiel Chief Business Official 408.423.2000 <a href="mailto:mschiel@scusd.net">mschiel@scusd.net</a>

# FEE PROPOSAL



## CVRA TRANSITION PROCESS

The proposed fee for Cooperative Strategies, LLC to perform the services as described in Section 2 of this Proposal is outlined below. This fee includes attendance at up to six (6) meetings at the School District. Such meetings include public hearings, Board meetings, and the meeting of the County Committee on School District Organization, as well as scenario creation and mapping services. This fee shall be payable in monthly installments based on the percentage of work completed.

SERVICE DESCRIPTION	PROPOSED FEE
Trustee Area Creation	\$19,500 (Plus Expenses)

Fees above are based on Agreement being entered into prior to February 28, 2023.

Should the District request additional scenarios beyond those identified in Section 2, the fee shall be \$375 per additional scenario.

Should the District request attendance at additional meetings beyond those identified in Exhibit A, such as community input meetings the fee shall be \$950 (plus reimbursable expenses) per additional meeting.

## STANDARD HOURLY RATES

Should TUSD request meetings or additional services outside the scope outlined in this proposal—such as our attendance at Community Input meetings—the fee for such services, including meeting preparation and travel time, will be billed at the standard hourly rates below, plus reimbursable expenses.

POSITION	RATE
CEO	\$300/hour
Executive Director / Partner	\$275/hour
Senior Director	\$225/hour
Senior Associate Director	\$200/hour
Associate Director	\$175/hour
Senior Associate	\$150/hour
Associate	\$120/hour



**REIMBURSABLE EXPENSES**

In addition to professional fees, TUSD is responsible for expenses including travel (mileage, lodging, parking, etc.), meals, all printing, postage, overnight delivery service, and other direct expenses associated with the project. Reimbursable expenses will be invoiced monthly with professional fees.