



COOPERATIVE STRATEGIES

COMPLETE FINANCIAL & DEMOGRAPHIC PLANNING FOR EDUCATION

SAN PASQUAL UNION SCHOOL DISTRICT

PROPOSAL TO PROVIDE TRUSTEE AREA CREATION SERVICES

NOVEMBER 15, 2018

PREPARED FOR:
San Pasqual Union School District
c/o AALRR
10 River Park Place East, Suite 240
Fresno, CA 93720
T 559.225.6700

PREPARED BY:
Cooperative Strategies
8955 Research Drive
Irvine, CA 92618
T 844.654.2421

OUR MISSION

Cooperative Strategies is dedicated to assisting local educational agencies in providing quality facilities for America's students. Our experienced and knowledgeable staff offers guidance throughout every step of the planning and financing of educational facilities—utilizing innovative technology, out-of-the-box problem solving methods, and inspiration from the best practices across the country.

It is our mission to build long-term relationships with our clients and provide them with resources and services for any and all of their needs along the way. This commitment allows our clients the peace of mind to focus on their core mission of educating students.

OUR EXPERTISE

FACILITIES PLANNING/ DEMOGRAPHIC SERVICES:

- Annual and Five-Year Reports
- Attendance Boundary Analyses
- Capacity Analyses
- Community Outreach
- Design Standards & Guidelines
- Developer Fee Justification Studies
- Developer Impact Analyses
- Developer Negotiations
- Educational Adequacy Analyses
- Educational Specifications
- Enrollment Projections
- Facilities Assessments
- Facilities Master Planning
- Facilities Usage Fee Justification Studies
- Geographic Information Systems Projects
- School Facilities & Funding Action Plans
- School Facilities Needs Analyses
- Trustee/Voting Areas

FINANCIAL ADVISORY SERVICES:

- Bond Anticipation Notes
- Certificates of Participation
- Continuing Disclosure
- Debt Refunding/Restructuring
- Funding Programs
- General Obligation Bonds
- Lease Revenue Bonds
- OPEB Benefits
- Redevelopment/Urban Renewal
- Special Tax Bonds
- Tax and Revenue Anticipation Notes

PROGRAM IMPLEMENTATION SERVICES:

- Clean Energy/Energy Efficiency
- Owner's Representation
- Project Management
- Site Acquisition/Disposition
- State Funding Assistance

SPECIAL TAX/ASSESSMENT SERVICES:

- Assessment District Administration
- Assessment District Formation
- Community Facilities District Administration
- Community Facilities District Formation
- Delinquency/Foreclosure Assistance
- Parcel Taxes

BROWSER BASED SOFTWARE:

- CerTracs™
- Facility101™
- DisclosureCompliance™
- myschoolLOCATION™

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LETTER OF INTEREST

David A. Soldani
AALRR
10 River Park Place East, Suite 240
Fresno, CA 93720

RE: Proposal to Provide Trustee Area Creation Services for San Pasqual Union School District

Dear Mr. Soldani,

Cooperative Strategies, LLC is pleased to submit the enclosed proposal ("Proposal") to provide trustee area creation services in compliance with the California Voting Rights Act ("CVRA") for San Pasqual Union School District ("SPUSD" or "School District").

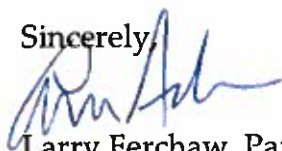
For more than 25 years, Cooperative Strategies has helped plan and finance school facilities for more than 2,000 Local Educational Agencies ("LEAs") across the nation. Our philosophy is to provide relationship-based consulting services primarily to LEAs; we believe it is important to thoroughly understand our clients' specific needs, which cannot be done as efficiently as consultants that serve competing public-sector entities. Furthermore, we believe in building long-lasting partnerships to aid our clients in achieving their long-term goals and objectives.

Given our long history of work with LEAs and our expertise in analyzing and evaluating demographic data, Cooperative Strategies 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 30 LEAs across the State of California ("State") which makes us intimately familiar with the requirements under the CVRA and the Federal Voting Rights Act ("FVRA").

We stand by our philosophy of acting as an advocate for our clients, and therefore **only** serve public agencies in these matters. We also offer simplified pricing with a single fee that includes all meetings required under applicable laws.

Thank you for the opportunity to submit the enclosed Proposal. Should you have any questions, please do not hesitate to contact me as I will serve as the primary point of contact for SPUSD.

Sincerely,



Larry Ferchaw, Partner
949.250.8341 | lferchaw@coopstrategies.com

FIRM OVERVIEW

About Us:

Cooperative Strategies was formed to offer premier consulting services to LEAs across the nation and has been aiding school districts in providing quality facilities for their students for over 25 years. In just the past few years, we've grown from a California-based company to a nationwide firm, with 50 professionals seated in three (3) locations in California, Colorado, and Ohio.

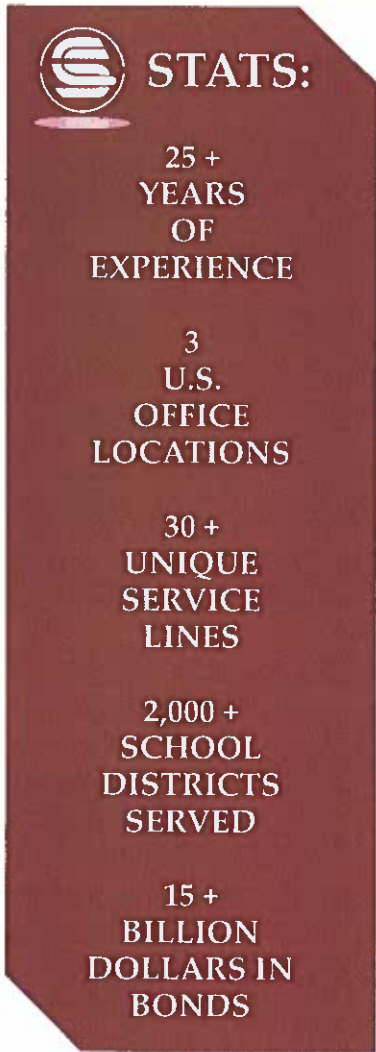
As our firm grows, we strive to continually expand our resources and offer fresh approaches to our clients with improved scale and capabilities. This includes a commitment to embrace technological advances and build efficiencies, so we can offer cost-effective consulting to school districts all over the country, regardless of their distance from our offices.

Having served more than 2,000 educational clients across 47 states and several countries, we provide our clients a unique level of service that is based on the best practices in the industry. We focus on building long-term relationships, which means our services are not concentrated on a one-time transaction, but rather on the specific characteristics and future goals of our clients.

Our Services:

Our professionals are dedicated to providing school districts with unique planning solutions from an experienced perspective. We pride ourselves on focused expertise while maintaining the ability to offer a broad spectrum of customized services in the areas of facilities planning/demographics, financial advisory, program implementation and special tax/assessment services.

Our comprehensive services allow us to serve as the voice of a school district from initial planning to final construction while taking on a pivotal role in ensuring the overall educational vision is understood and accounted for at all times. By truly becoming a partner with our clients, we become an extension of the school district itself, effectively freeing up time and effort to allow administration to focus on their core mission of educating and serving students.



STATS:

- 25 + YEARS OF EXPERIENCE
- 3 U.S. OFFICE LOCATIONS
- 30 + UNIQUE SERVICE LINES
- 2,000 + SCHOOL DISTRICTS SERVED
- 15 + BILLION DOLLARS IN BONDS

Our Office Locations:



OHIO

3325 Hilliard Rome Road
Hilliard, OH 43026
T 614.798.8828

COLORADO

14142 Denver W. Pkwy., Ste. 280
Lakewood, CO 80401
T 720.466.8680

CALIFORNIA

8955 Research Drive
Irvine, CA 92618
T 949.250.8300

Team Qualifications:

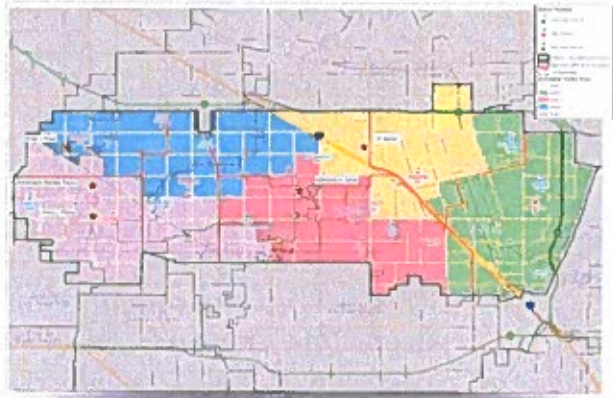
- **Four (4) Recognized Educational Facility Planners ("REFP")** by the Association for Learning Environments (formerly Council of Educational Facility Planners International ("CEFPI"))
- **Six (6) Series 50 Qualified Municipal Advisors**
- **Certified Geographic Information Systems Professional ("GISP")**
- **National recognition as leaders in educational facility planning and for effective consensus-building activities**
- **Backgrounds in education, technology, facilitation, and management**
- **Professional training through and numerous presentations at state, national, and international organizations**
- **Conducting and coordinating projects in 47 states and the District of Columbia, Canada, Kuwait, and Honduras**
- **Involvement in developing prototypical elementary, middle, and high school facilities**
- **Over 280 Educational Specifications** for elementary, middle, high and other schools
- **Over 300 Facility Plans** for urban, suburban, and rural communities
- **Over 4,000 Enrollment Projections**
- **One (1) national and two (2) statewide facility assessments**
- **Development of planning standards** for state and local districts
- **Approximately 1,000 fee justification studies/impact mitigation plans**

SCOPE OF SERVICES

Trustee Area Creation:

Cooperative Strategies has aided a number of LEAs throughout the State 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 School District 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 School 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. Cooperative Strategies then aids in the approval and adoption process to finalize and implement the new trustee area election method.

The following scope of work outlines the specific activities and tasks involved in Cooperative Strategies' trustee area creation services.

Trustee Area Creation Scope of Work:

ACTIVITY I. GOALS AND PRIORITIES AND DATA ANALYSIS

Task 1 Identify Goals and Priorities

This task involves determining the goals the School 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, 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 School 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 2010 Census data to obtain information on population within the School 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 School 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. Cooperative Strategies 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

This task involves assisting in a public outreach effort to present conceptual scenarios to the public and solicit feedback from constituents on the scenarios.

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. Cooperative Strategies will provide these organizations with supporting data/information and answer questions on behalf of the District. Cooperative Strategies will also 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.

PAST PROJECTS

Please see below for a list of some of the LEAs we have previously provided similar services to. Please note, we cannot disclose the full list of our clients for whom we have performed liability analysis services as many engaged our services through legal counsel which remain under attorney-client privilege.

District Name	Location	Service Type
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
Apple Valley Unified School District	San Bernardino County	Trustee Area Creation Services
Banning Unified School District	Riverside County	Trustee Area Creation Services
Beaumont Unified School District	Riverside County	Trustee Area Creation Services
City of Garden Grove	Orange County	CVRA Analysis
Corona-Norco Unified School District	Riverside County	Trustee Area Creation Services
Desert Sands Unified School District	Riverside County	Trustee Area Creation Services
Dublin Unified School District	Alameda County	Trustee Area Creation Services
Etiwanda School District	San Bernardino County	Trustee Area Creation Services
Fullerton School District	Orange County	Trustee Area Creation Services
Garden Grove Unified School District	Orange County	Trustee Area Creation Services
Hesperia Unified School District	San Bernardino County	Trustee Area Creation Services
Imperial Valley Community College District	Imperial County	Trustee Area Creation Services

SECTION III – Past Projects



District Name	Location	Service Type
Lincoln Unified School District	San Joaquin County	Trustee Area Creation Services
Moreno Valley Unified School District	Riverside County	Trustee Area Creation Services
North Orange County Community College District	Orange County	Trustee Area Creation Services
Ontario-Montclair School District	San Bernardino County	Trustee Area Creation Services
Oxnard School District	Ventura County	CVRA Analysis & Trustee Area Creation Services
Palm Springs Unified School District	Riverside County	Trustee Area Creation Services
Perris Elementary School District	Riverside County	Trustee Area Creation Services
Redlands Unified School District	San Bernardino County	Trustee Area Creation Services
Riverside Community College District	Riverside County	Trustee Area Creation Services
Romoland School District	Riverside County	Trustee Area Creation Services
San Mateo County Community College District	San Mateo County	Trustee Area Creation Services
Santa Rosa City Schools	Sonoma County	Trustee Area Creation Services
Snowline Joint Unified School District	San Bernardino 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
Victor Elementary School District	San Bernardino County	Trustee Area Creation Services
Victor Valley Union High School District	San Bernardino County	Trustee Area Creation Services
William S. Hart Union High School District	Los Angeles County	Trustee Area Creation Services

EXPERIENCED PERSONNEL



LARRY FERCHAW
Partner

Larry Ferchaw has assisted a wide range of LEAs identify the impact of new development, levy fees against such development, and plan for future school facilities. Mr. Ferchaw

has prepared various demographic and financial analyses and has assisted LEAs that range in size from small, rural elementary LEAs to some of the largest urban and suburban LEAs in the Country.

He specializes in projecting enrollment and analyzing capacities to determine future student impact on school facilities. He also aids LEAs in identifying new construction and modernization needs while navigating the financial implications of such projects.

Education:

- B.A., History, University of California, Los Angeles
- M.S., Journalism, Columbia University

Areas of Expertise:

- Boundary Planning & Redistricting
- Community Outreach
- Trustee Area Creation
- Facilities Master Planning

Notable Accomplishments:

- Member, Coalition for Adequate School Housing
- Helped correct 2016 Level I developer fee rates resulting in higher fees school districts can impose on new construction

SAMPLE PLANNING EXPERIENCE:

Anaheim Elementary School District, CA
Fee Justification Studies; Trustee Area Creation

Anaheim Union High School District, CA
Facilities Master Plan, Trustee Area Creation

Beaumont Unified School District, CA
Facilities Master Plan

Byron Union School District, CA
Enrollment Projections

Coachella Unified School District, CA
Enrollment Projections

Desert Sands Unified School District, CA
Enrollment Projections; Trustee Area Creation

Dublin Unified School District, CA
Trustee Area Creation

Fremont Unified School District, CA
Fee Justification Studies; Enrollment Projections

Moreland School District, CA
Boundary Adjustments; Fee Justification Studies

Norris School District, CA
Facilities Master Plan

Ontario-Montclair School District, CA
Trustee Area Creation

Palm Springs Unified School District, CA
Enrollment Projections; Boundary Adjustments

Redondo Beach Unified School District, CA
Fee Justification Studies; Enrollment Projections

Rialto Unified School District, CA
Boundary Adjustments

San Mateo County Community College District, CA
Trustee Area Creation

Santa Clara Unified School District, CA
Fee Justification Studies

Val Verde Unified School District, CA
Fee Justification Studies; Facilities Action Plan



ANDREW BISHOP
Senior Associate Director

Andrew Bishop has provided financial, demographic, and cartographic services to a wide variety of LEAs since 2005. His expertise with Geographic Information Systems has helped illustrate a variety of demographic and facilities planning services for hundreds of school districts.

Andrew also has extensive experience in calculating student generation rates to determine future student enrollment and the resulting impact on school facilities.

Education:

- B.A., Geography, University of California, Los Angeles

Areas of Expertise:

- Developer Fee Justification Studies
- School Facilities Needs Analyses
- Enrollment Projections
- Capacity Analyses
- Geographic Information Systems
- Assessment District Administration
- Trustee Area Redistricting

Notable Accomplishments:

- Finalist, NYC Department of Education Call for Innovations, Enhancing School Zoning Efforts by Predicting Population change

SAMPLE PLANNING EXPERIENCE:

Alum Rock Union Elementary School District, CA

Enrollment Projections

Anaheim Elementary School District, CA

Trustee/Voting Areas

Beverly Hills Unified School District, CA

Developer Fee Justification

Bonita Unified District, CA

*Developer Fee Justification,
RIMD Administration*

Byron Union School District, CA

*Developer Fee Justification,
Enrollment Projections*

Capistrano Unified School District, CA

*Annual and Five-Year Reports,
Developer Fee Justification*

Fremont Unified School District, CA

*Developer Fee Justification,
Enrollment Projections,
School Facilities Needs Analysis*

Hesperia Unified School District, CA

*Annual and Five-Year Reports
Developer Fee Justification,
Enrollment Projections,
School Facilities Needs Analyses*

Irvine Unified School District, CA

*Annual and Five-Year Reports,
Developer Fee Justification,
RIMD Administration,
School Facilities Needs Analyses*

Menifee Union School District, CA

*Annual and Five-Year Reports,
Developer Fee Justification,
School Facilities Needs Analyses*

Palm Springs Unified School District, CA

Developer Fee Justification

Redondo Beach Unified School District, CA

*Attendance Boundary Analysis,
Developer Fee Justification,
Enrollment Projections*

REFERENCES

District Name	Contact Information	Address
Oxnard School District	Dr. Cesar Morales Superintendent 805.487.3918 drcmorales@oxnardsd.org	1051 South A Street Oxnard CA 93030
Ventura Unified School District	Anthony Ramos General Counsel 805.641.5000 anthony.ramos@venturausd.org	255 West Stanley Ave., Ste. 100 Ventura, CA 93001
Antelope Valley Union High School District	Dr. David Vierra Superintendent 661.948.7655 dvierra@avhsd.org	44811 N. Sierra Hwy. Lancaster, CA 93534
Fullerton School District	Dr. Robert Pletka Superintendent 714.447.7400 robert_pletka@fullertonsd.org	1401 W. Valencia Drive Fullerton, CA 92833
Garden Grove Unified School District	Dr. Gabriela Mafi Superintendent 714.663.6000 gmafi@ggusd.us	10331 Stanford Avenue Garden Grove, CA 92840
William S. Hart Union High School District	Vicki Engbrecht Superintendent 661.259.0033 vengbrecht@hartdistrict.org	21380 Centre Pointe Pkwy. Santa Clarita, CA 91350

FEE PROPOSAL

The proposed fee for Cooperative Strategies to perform demographic services to aid in the transition from at-large elections to by-trustee area elections is outlined below. This fee includes attendance at up to nine (9) meetings at the School District (public hearings, community input meetings, Board meetings, and the meeting of the County Committee on School District Organization), as well as scenario creation and mapping services.

Service Description	Proposed Fees
Trustee Area Creation	\$15,000 (Plus expenses, not to exceed \$1,000)

Should the School District require attendance at additional meetings beyond those identified above, the fee shall be \$700 per additional meeting.