



Charles Kofron, Ph.D. LLC

LETTER OF AGREEMENT DEMOGRAPHIC AND HOUSING INFORMATION STUDY

February 6, 2024

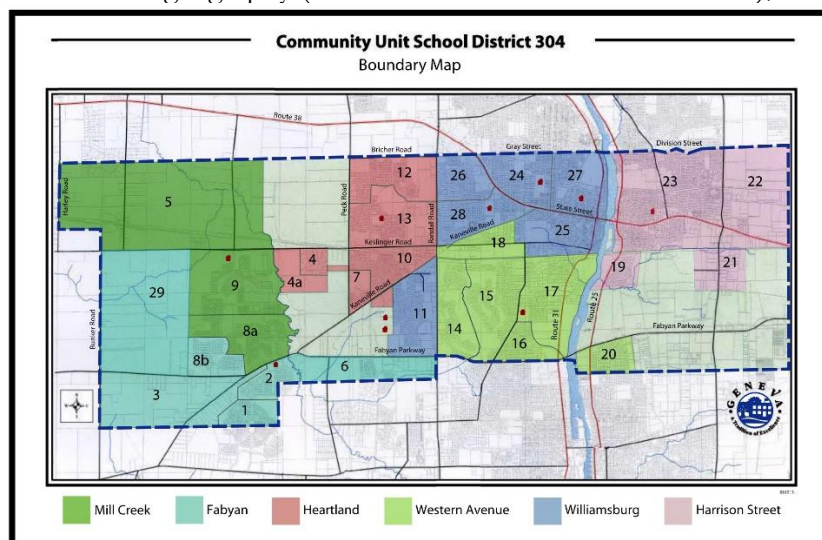
Dr. Andrew Barrett, Superintendent
Geneva CUSD 304
227 N Fourth Street
Geneva, IL 60134

Dear Dr. Barrett,

Thank you for allowing me to propose a demographic and housing study for the Geneva CUSD 304 (District). This is the Letter of Agreement (LOA) that authorizes the study.

For the sum of \$21,875, I (Charles Kofron dba Charles Kofron, Ph.D. LLC) will do the following:

- 1) Create base mapping based on Kane County (County) GIS parcel and address point data, obtained by the District from Kane County, with District planning or subareas, and unique elementary areas which will be the base map for all mapping requirements;
 - i. Transpose District subarea geography onto parcel and address point data;
 - ii. Add Kane County tax assessment and housing data, obtained by the District, to parcel data with subarea geography (areas identified with numbers below);



Geneva CUSD 304 Proposal
Demographic and Enrollment Information Study
Charles Kofron, Ph.D. LLC
2 | Page

- 2) Geocode (address match) 10 years of birth records obtained from the IDPH for calendar years 2011-2021 and, if available, 2022 and reconcile unmatched records with District support;
- 3) Geocode (address match) 10 years of student records as of September 30 (or the last Wednesday of September or as of October 1), obtained from the District, with full addresses, grades, and current District school attending; reconcile unmatched records with District support;
- 4) Develop counts of students by grade, subareas, and unique attendance areas by overlaying District boundaries using the District's base map;
- 5) Code and develop counts of births by kindergarten cohort year by overlaying District boundaries using the District's base map;
- 6) Build a cohort component K-12 enrollment projection model based on resident student counts and birth counts by subareas and roll up totals for elementary attendance areas;
- 7) Add student and birth counts to the enrollment projection model;
- 8) Develop cohort survival ratios (CSRs)(i.e., students surviving from previous years to succeeding years) for grades K-12 by grade and attendance area using subarea counts as of September 30 for all school years;
- 9) Use CSRs to generate empirical (i.e., from actual data) high, mid, and low enrollment projections from weighted averages of CSRs over the last 5 years by grade for grades K-12, by subarea, and summarize by unique attendance area by year for the 2024-2027 school years;
- 10) Depending on birth record availability for calendar year 2022, the empirical enrollment projections may be extended to the 2028-29 school year;
- 11) Using empirical enrollment projections, extrapolate projected trends for an additional 5 years or to school year 2032-33 (or depending on birth data availability, 2033-34);
- 12) Generate tables and graphs of K-12 enrollment projections by grade, unique attendance areas, and roll-ups for the District;
- 13) Develop map compositions showing concentrations of students and births with District building locations;
- 14) Develop tables of available housing data by unique attendance area and summarize by housing type (bedrooms) and if available by below market rate data for all units;
- 15) Extract resident student housing data by parcel, summarize by housing type and, if available, by below market rates for all unit types;
- 16) Develop student to total housing ratios by unit type;
- 17) Identify from District and local government sources the numbers of planned units by housing type, bedroom, and market rate;
- 18) Apply ratios to determine possible enrollment impacts from new housing development and develop a draft report of findings to include all tables, graphs, maps, and trends observed at the District level and summary findings of total enrollments and projections for grades K-12 by attendance area using subarea tabulation units;
- 19) If needed, present a draft of findings to District administration and meet to review findings;
- 20) If necessary, develop and present a PowerPoint presentation of findings at a venue and an audience defined and scheduled by the District;
- 21) Provide a final summary report of findings and all tables, graphs, and maps.

General Terms and Understandings

This action plan relies heavily on authoritative and updatable geographic data that are available to the District from the GIS Director and the Kane (County) GIS. The District is required to request these data

Geneva CUSD 304 Proposal
Demographic and Enrollment Information Study
Charles Kofron, Ph.D. LLC
3 | Page

from the County and, perhaps, sign a data use agreement with the County for this project. Charles Kofron will assist the District in requesting and receiving these data from the County.

Parcel data is required to digitize subarea and attendance area boundaries. The District is required to review Charles Kofron's interpretation of existing subarea and attendance area boundaries and, if found to be incorrect, identify boundaries that require revision. Charles Kofron will provide a small-scale (large format) map of the District electronically (in pdf format) that the District may print in-house (on a large format printer) for marking-up during the review. If necessary, Charles Kofron may provide a hard copy of the same map for District revisions. The results of the editing will be transmitted back to Charles Kofron using the pdf electronic format or a hard copy of the map with the required revisions.

The preparation of empirical (data-driven) 5-year enrollment projections by grade and attendance area is a best practices action plan. The data required for the development of a cohort projection model includes K-12 resident student counts, non-resident student counts, and birth counts adjusted for kindergarten cohort years by unique (i.e., combinations of elementary, middle, and high school) attendance areas. Subareas identified with numbers in the map above are the lowest level of geography for counting student and birth records using boundaries digitized on parcel data and may be used for assessing current attendance area boundaries.

To develop these student and birth counts, student and birth records are geocoded (or address matched) to the County's base map, assigned to unique subareas comprising attendance areas, and counted by subarea and attendance areas. Unmatched addresses are reviewed and included in the counts if found to be in District subareas. These counts serve as the data inputs for the enrollment projection model.

A minimum of 7 years of student records are required from the District, but 10 years are preferred. The District agrees to provide Charles Kofron with these student-record data which will include full street address, zip code, grade entering, and school year as of September 30 for the last 7 or 10 school years. Other data may be included on student records which may be useful to the District. The District will provide these data in a digital (electronic) format to Charles Kofron which may include Excel or csv file formats. The District will also provide Charles Kofron a data dictionary or a table of values for codes contained in student records.

For unique attendance areas, K-12 enrollments and birth counts are assembled by class or cohort, cohort survival ratios are calculated by grade, and enrollment projections series are developed using weighted averages (for high, mid, and low projections). A "snapshot" projection is also provided as a projection series. This is an unweighted projection of enrollments assuming that current and previous year enrollments continue over the following 5 years. Extrapolations of the 4 series of projections will be provided. Both empirical and extrapolated projections will be provided in tables and graphs in the final report.

The District understands that 10 years of birth address records by zip code are required to develop kindergarten projections. These records must include the full address of the mother, birth year, birth month, zip code, and city or place of the address. Additional data including race and ethnicity may also be requested. Access to these birth records requires the District to enter into a data use agreement with the Illinois Department of Public Health, Vital Records Division (IDPH). The District understands that the IDPH is the source and steward for these data and these data are protected by HIPAA laws and statutes.

Geneva CUSD 304 Proposal
Demographic and Enrollment Information Study
Charles Kofron, Ph.D. LLC
4 | Page

Therefore, HIPAA confidentiality requirements will be agreed to and strictly followed by the District and Charles Kofron. Charles Kofron will assist the District in completing the data use agreement application process.

The District understands that Charles Kofron has no control over the timing or the receipt of the data use agreement or the data from the IDPH. As the District works through the IDPH application process, Charles Kofron will work with the District to develop the base map and process available data including student records. These data may be used to develop preliminary projections and a preliminary report. Preliminary projections will be revised as birth data from the IDPH are received, processed, and added to the projection model. The results will be used to update preliminary report findings and finalize the report.

The District understands that geocoding (or address matching) will result in a number of student and birth address records that don't match County base mapping. These records will need to be reviewed manually. The District agrees to provide staff assistance to manually geocode student address that fail to match parcel or street centerline data from the County. District staff will identify, from unmatched addresses, those addresses that fall with District boundaries and within subareas. Charles Kofron will provide unmatched student addresses for District review in a machine-readable (Excel file) format. The District agrees to return the results of the student record review to Charles Kofron.

The District understands that birth addresses will be extracted by zip code and for zip codes intersecting District boundaries. For birth addresses that fail to match County base mapping, the District will provide staff assistance to manually match addresses that fall within District boundaries and within subareas. The protocol for reviewing these unmatched addresses includes only District staff signing and having on file confidentiality pledges at the IDPH. Charles Kofron must be present at the time of the review and will assist District staff in reviewing the unmatched addresses. The District agrees to provide an appropriate place (i.e., a room with an overhead projector capable of projecting an image from a laptop computer with a HDMI video port, conference table, electricity, etc.) in the District for conducting and completing the review.

Charles Kofron and the District will comply with all requirements for maintaining the confidentiality of data, nondisclosure, and/or specific use. Data provided under these terms will only be used for the intended purposes of this study.

There will be no change to this agreement and the scope of work unless both parties agree to the change in writing. However, the District may wish to include additional options beyond this scope of work. Additional services beyond this agreement will require the written consent of both parties or a new Agreement. Additional hours will be billed at the rate of \$125 per hour and invoiced separately.

With the development of this projection model using these data agreements and methodologies, Charles Kofron will be available to replicate this study with single years of data and update the enrollment projections in the future. The District may exercise this option with another letter of agreement.

The District agrees to release, indemnify, and hold harmless Charles Kofron and his assigns, from and against all liability for conducting the study, including any and all errors of omission and commission that

Geneva CUSD 304 Proposal
Demographic and Enrollment Information Study
Charles Kofron, Ph.D. LLC
5 | Page

may be associated with all data processed in this study, and the results, conclusions, interpretations, and any uses of any of the data, graphs, exhibits, or materials that ensure from this study.

A typical billing arrangement is for Charles Kofron to invoice the District for one-third of the amount after 30 days of the beginning of the study or the execution of a letter of agreement, one-third of the amount at the half-way point of the study, and the final one-third of the amount within 30 days of the conclusion of the study and the delivery of the final report.

If the terms of this agreement are acceptable, please sign, scan, and return to me a copy of this page (pdf format).

Sincerely,



Charles Kofron, Ph.D. LLC

Authorized by:

Authorizing District official signature

Date

Print or type signature name