



COOPERATIVE
STRATEGIES

COMPLETE FINANCIAL & DEMOGRAPHIC PLANNING FOR EDUCATION

DULUTH PUBLIC SCHOOLS

PROPOSAL TO PROVIDE BOUNDARY PLANNING SERVICES

APRIL 11, 2019

PREPARED FOR:

Duluth Public Schools
215 N. 1st Avenue East, Rm 214
Duluth, MN 55802
T 218.336.8700

PREPARED BY:

Cooperative Strategies
3325 Hilliard Rome Road
Hilliard, OH 43026
T 614.798.8828

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

Mr. Bill Gronseth
Duluth Public Schools
215 N. 1st Avenue East, Rm 214
Duluth, MN 55802

RE: Proposal to Provide Boundary Planning Services

Dear Mr. Gronseth,

Cooperative Strategies is pleased to submit the enclosed proposal ("Proposal") to provide boundary planning services to Duluth Public Schools ("DPS" or "District").

Over the past 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.

Throughout our history, we've helped school districts of all sizes across the country with boundary planning and redistricting. Our advanced Geographic Information Systems ("GIS") capabilities allow us to create and modify boundary scenarios in real time. This means that while attending meetings with school corporation leadership, we can immediately illustrate how changes will impact different schools.

Thank you again 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 the District. We look forward to the prospect of working with DPS!

Sincerely,



Matt Sachs
Associate Director
614.526.3065
msachs@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

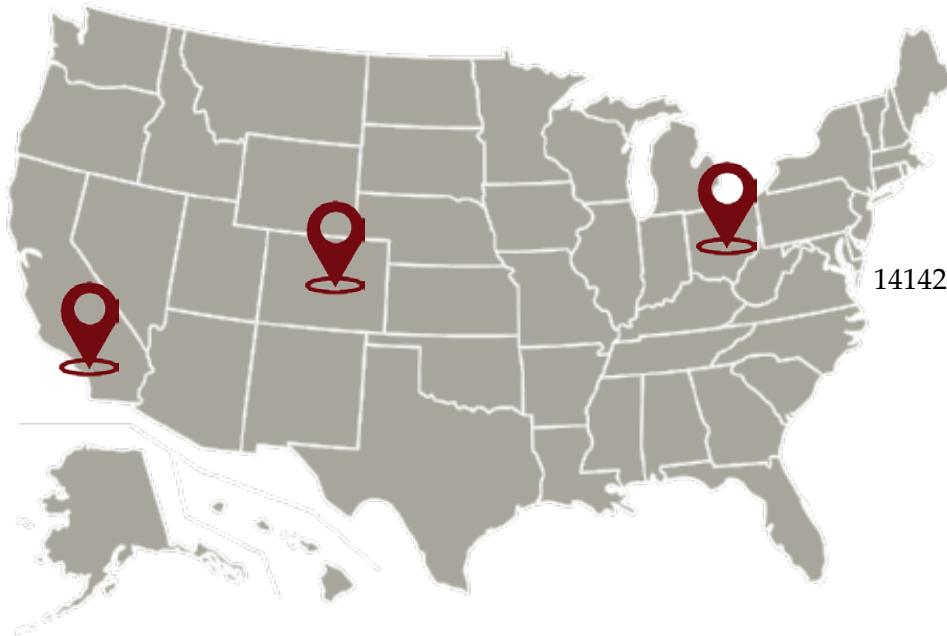
3
U.S.
OFFICE
LOCATIONS

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 **250 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

SCOPE OF SERVICES

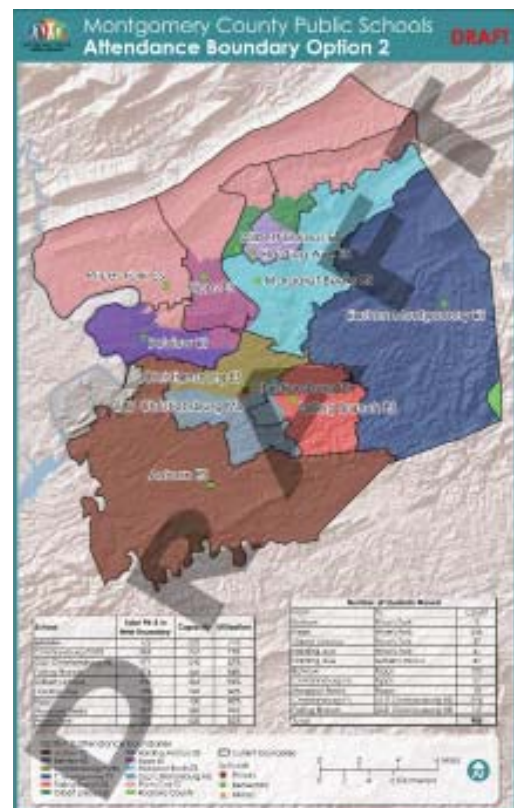
Overview:

Cooperative Strategies positions school districts, states, and nations to develop quality learning environments through a systematic process that maximizes the use of data and community participation. Our goal is to empower organizations with the tools necessary to make smart, practical decisions for students.

Attendance boundary redistricting is a process used by school districts when it has become apparent that re-distribution of students among schools is necessary. This may be due to a variety of factors, including the opening of a new school, increasing or decreasing enrollment, housing trends, student migration, or balancing facility capacity.

Our redistricting process is based on continual feedback and engagement with a school district's administration. In order to ensure consistency with a school district's goals and priorities, our staff communicates with administration early in the process to establish a set of criteria to base potential boundaries off of. Such criteria may include, but not be limited to:

- **Boundary Criteria:**
 - Balanced utilization (enrollment vs. capacity)
 - Enrollment trends and projected growth
 - Clean feeder patterns
 - Educational programs
 - Socio-economic makeup of student bodies
 - Transportation costs
- **Planning Parameters:**
 - Proximity to school
 - Travel time
 - Program continuity
 - Facility utilization
 - School size
 - Diversity





Community Engagement:

Our team believes that school planning must be an inclusive process. It is a powerful opportunity for a school community to come together to determine how educational facilities can be an impetus for change and improvement for all parties. Development of a school district’s facility plan requires the collaboration of educators, administrators, policy makers, community members, and facility experts.

When drawing new attendance boundaries, we recommend a community-based process to ease tension and build consensus about an issue that is often challenging. The process includes both quantitative information, such as enrollment figures and use of GIS, and qualitative information, such as community input and stakeholder opinions.

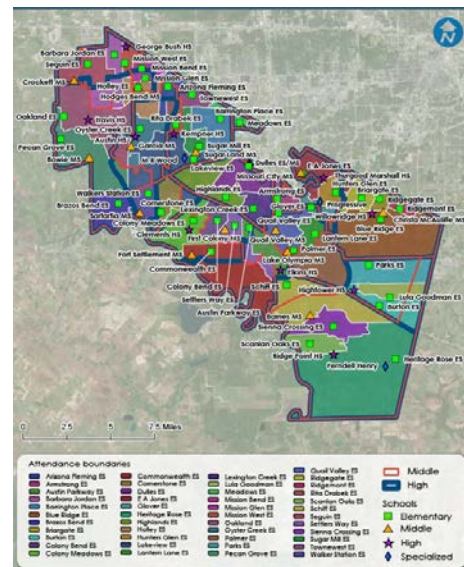
Technological Resources:

GIS:

When redistricting attendance boundaries, we place a heavy emphasis on our technological capabilities that allow us to demonstrate options to our clients. By mapping students and attendance boundaries with GIS, we can display important information in an illustrative meaningful way.

Using GIS, criteria such as natural geography, bus ride times, and demographic make-up of a student population are easily incorporated into a boundary plan to develop scenarios quickly and precisely. Data incorporated into the GIS includes, but is not limited to the following:

- Student locations
- Grade level and school attending
- Demographics including race, gender and free & reduced lunch
- Programming such as ESL
- School locations
- Current and proposed attendance boundaries
- Housing development



SECTION II – Scope of Services

School Locator:

Once the final recommended boundaries have been determined, we will upload the scenario into our myschoolLOCATION™ platform. This software-as-a-service is included within our attendance boundary redistricting services for one (1) year after the initial site set up and creation. myschoolLOCATION™ allows a school district's community to use their addresses to identify which schools their students will attend and is accessible through a school district's website.

The interactive software allows users to change views from district wide to school level boundaries. Users can also access driving and walking directions from their home to any school location. If community members are considering moving, they can also use this online tool to drag their home location into any area of the school district's boundaries and the resident schools will automatically populate.

myschoolLOCATION
a product of ES&S

Fremont Unified School District

Find Your School
Enter Address, City, Zip
[Find My Schools](#)

Get Directions
Ardmore Elementary
[Get Driving Directions](#) [Get Walking Directions](#)

School Boundaries
Address Found: 38178 Camden Street, Fremont, CA 94536, USA

Parkmont Elementary School
2601 Parkside Drive
Fremont, CA 94536
Phone: 510.793.7492
Fax: 510.793.1476
Mascot: Panthers
[Website](#)

Centerville Junior High School
37720 Fremont Boulevard
Fremont, CA 94536
Phone: 510.797.2072
Fax: 510.794.7588
Mascot: Mustangs
[Website](#)

Washington High School
38442 Fremont Boulevard
Fremont, CA 94536
Phone: 510.505.7300
Fax: 510.794.8437
Mascot: Huskies
[Website](#)

SECTION II – Scope of Services

Scope of Work:

The following scope of work outlines the activities and tasks that we have deemed necessary to best assist Duluth Public Schools with redistricting services.

The following scope will be utilized for K-12 Boundary Planning.



ACTIVITY I. DATA ANALYSIS AND REVIEW

Task 1 Data Collection

This task involves collecting and organizing information gathered from the sources identified above. Such data may include, but not be limited to:

- Existing enrollment projections
- District demographic profile
- GIS
- Capacity of facilities
- Corporation's program profile, financial and budgetary information
- Current student database including student ID, lunch program code, special education data, address, and school and grade level data (any identification information such as student name should be eliminated from the database before being submitted to Cooperative Strategies)
- Current housing developments
- Planned and / or approved residential developments within the School Corporation

Task 2 Project Website

This task involves creating a project website and updating as necessary throughout the process to ensure public information is up-to-date with project schedules and status.

ACTIVITY II. BOUNDARY OPTIONS DEVELOPMENT

Task 3 **Plan for Planning Meeting**

This task involves holding a one-day work session with the School District to set the parameters for the boundary planning process.

Task 4 **Boundary Committee Meetings**

This task involves facilitating four (4) meetings of local stakeholders to develop boundary options over two (2) days. This committee will utilize all current enrollment data and have a live version of GIS at their disposal to use in the development of options. These options will then be presented to the larger community.

Task 5 **Options Packet**

This task involves developing an options packet outlining scenarios drafted in the above tasks to be used at community meetings.

Task 6 **Focus Group Meetings**

This task involves facilitating four (4) focus group sessions to collect anecdotal qualitative feedback from stakeholder groups selected by the District.

ACTIVITY III. INTERACTIVE MAPPING

Task 7 **Geographic Information Systems**

This task involves the use of GIS to depict students that live within the boundary, students who live in but attend outside the boundary, and students who live outside the boundary but attend in. Population and housing demographics can also be overlaid to determine growth trends in different areas of the School Corporation. GIS services will include:

- Updating existing GIS database from previous planning process
- Geocoding students up to current enrollment
- Updating all boundary maps
- Creating options maps for community input
- Providing adopted boundary maps and physical descriptions of all new boundaries

Task 8 School Locator

This task involves providing software as a service ("SaaS") known as myschoolLOCATION™. This SaaS will create the school location software that will be available for the District's residents to identify which boundaries they reside in and the specific school sites their students can attend. Additionally, myschoolLOCATION™ will be linked to and accessible through the District's website. No additional costs will be incurred by the District for this SaaS during the school year(s) in which attendance boundary redistricting services are being provided. Should the District choose to continue using myschoolLOCATION™ after the initial project service period, a separate maintenance agreement can be negotiated.

ACTIVITY V. COMMUNITY OUTREACH

Task 9 Community Presentation

This task involves hosting two (2) meetings to share the options with the community. After a presentation of the background data and options packets, participants are asked to work in small groups to identify benefits and challenges of each option.

Task 10 Web Questionnaire

This task involves providing a web-based questionnaire to be available to community members who are unable to attend in-person meetings to ensure full participation from stakeholders. All presentation materials and options packets will also be available online.

ACTIVITY VI. FINAL RECOMMENDATIONS

Task 11 Recommendations Work Session

This task involves holding a one-day work session with the District to finalize the recommended options. These options will incorporate input from the Community Meeting and the boundary committees.

Task 12 Final Report

This task involves compiling the preferred option into an official recommendation that will be presented to the Board for final approval.

SECTION II – Scope of Services



Task 13 Board Meeting Attendance

This task involves attending two (2) meetings of the School Board to provide an update on the process and present the final recommendations.

EXPERIENCED PERSONNEL



MATT SACHS
Associate Director

Matt Sachs has been assisting school districts across the country with facility and demographic planning since 2011. His role as the Geographic Information Systems Analyst is to assist in GIS projects by analyzing spatial data and producing report quality maps for facilities master planning, redistricting, and build-out scenarios.

Prior to joining the Cooperative Strategies team, Matt interned at the Ohio Department of Natural Resources creating and editing parcel data for the potential selling and leasing of property.

Education:

- B.A., Geography & History, Ohio University
- GIS Certificate, Columbus State Community College

Areas of Expertise:

- Geographic Information Systems
- Facilities Master Planning
- Capacity & Utilization Analyses
- Demographic Studies
- Boundary Analysis & Redistricting

Notable Accomplishments:

- Member, Association for Learning Environments ("A4LE") (formerly Council of Educational Facility Planners International)

SAMPLE PLANNING EXPERIENCE:

Arlington Independent School District, TX
Facilities Master Plan; Space Utilization Study

Auburn City Schools, AL
Capacity Analysis; Build-out Scenario

Baltimore City Public Schools, MD
District-wide GIS Mapping

Bridgeport Public Schools, CT
Facilities Master Plan Update

Decatur City Schools, AL
Land Use Analysis

Duval County Public Schools, FL
Space Utilization Study

Fort Bend Independent School District, TX
Facilities Master Planning

Fort Wayne Community Schools, IN
Demographic Analysis

Hamilton Southeastern Schools, IN
Redistricting

Huntsville City Schools, AL
District-wide Capacity Analysis & Space Utilization Study; Unitary Status

Iowa City Community School District, IA
Build-out Scenario

Kingsport City Schools, TN
Facilities Master Plan; Space Utilization Study

Midland Independent School District, TX
Demographic Analysis; Build-out Scenario; Redistricting

Norfolk Public Schools, VA
Capacity Analysis; Facilities Master Plan

Rochester Public Schools, MN
Facilities Master Plan; Redistricting

Shenandoah County Public Schools, VA
Facilities Master Plan; Redistricting

SECTION III – Experienced Personnel



KAREN DANIEL-HAMBERG Associate Director

Karen Daniel-Hamberg is involved in the preparation of materials for the many facility planning and demographic services Cooperative Strategies provides to LEAs. She analyzes data to create maps, charts, and tables that clearly illustrate the needs of school districts.

Karen also attends community meetings as a data liaison. She is involved in all aspects of the facilities master planning process, from creating a background report to drafting recommendations.

Education:

- B.A., Geography, Wittenberg University

Areas of Expertise:

- Geographic Information Systems (GIS)
- Facilities Master Planning
- Boundary Planning
- Facilities Assessments
- Capacity & Utilization Studies
- Educational Specifications

Notable Accomplishments:

- Member, Association for Learning Environments (formerly Council of Educational Facility Planners International)

SAMPLE PLANNING EXPERIENCE:

Baltimore City Schools, MD
Rezoning Feasibility Study

Boise School District, ID
Facilities Master Plan

City Schools of Decatur, GA
Grade Configuration Planning; Boundary Planning

Columbus City Schools, OH
Facilities Master Plan

Duval County Public Schools, FL
Facilities Master Plan

Fauquier County Public Schools, VA
Facilities Master Plan

Fort Bend Independent School District, TX
Boundary Planning; Facilities Master Plan; Feeder Alignment

Fort Wayne Community Schools, IN
Demographic Analyses; Enrollment Projections

Fulton County Schools, GA
STEM HS Educational Specifications

Norfolk Public Schools, VA
Enrollment Projections

Olentangy Local School District, OH
Boundary Planning

Polk County Public Schools, FL
Boundary Planning

Rhode Island Department of Education, RI
Statewide Facilities Master Plan & Assessments

School District of Manatee County, FL
Facilities Master Plan

Worthington Schools, OH
Facilities Master Plan; Capacity Analyses

Teays Valley Local Schools, OH
Boundary Planning

Williamsburg-James City County Public Schools, VA
Boundary Planning



SEAN HAYES
Associate

Sean Hayes provides demographic support to Cooperative Strategies by performing various analyses. His background enables him to accurately interpret data that is used to project enrollment, define boundaries, and determine facility capacity for school districts across the country.

Prior to joining Cooperative Strategies in 2018, Sean worked in catering/event management where he oversaw scheduling and procurement, developed and led employee training, and managed large-scale events.

Education:

- B.S., GIS and Spatial Analysis, The Ohio State University
- Minor, Economics

Areas of Expertise:

- Boundary Analysis & Redistricting
- Capacity and Utilization Studies
- Enrollment Projections
- Geographic Information Systems ("GIS") Analysis
- Live/Attend Analysis
- Student Demographic Analysis

SAMPLE PLANNING EXPERIENCE:

Arlington Independent School District, TX
Facilities Master Plan

Auburn City Schools, AL
Enrollment Projections

Calhan School District, CO
Enrollment Projections

Canby School District, OR
Enrollment Projections

Center Grove Community School Corporation, IN
Redistricting; Boundary Planning

Columbia Public Schools, MO
Enrollment Projections

Dallas School District, OR
Enrollment Projections

Greene County Schools, TN
Enrollment Projections

Hamilton Southeastern Schools, IN
Redistricting; Boundary Planning

Huntsville City Schools, AL
Enrollment Projections

Mt. Diablo Unified School District, CA
Enrollment Projections

Norfolk Public Schools, VA
Enrollment Projections

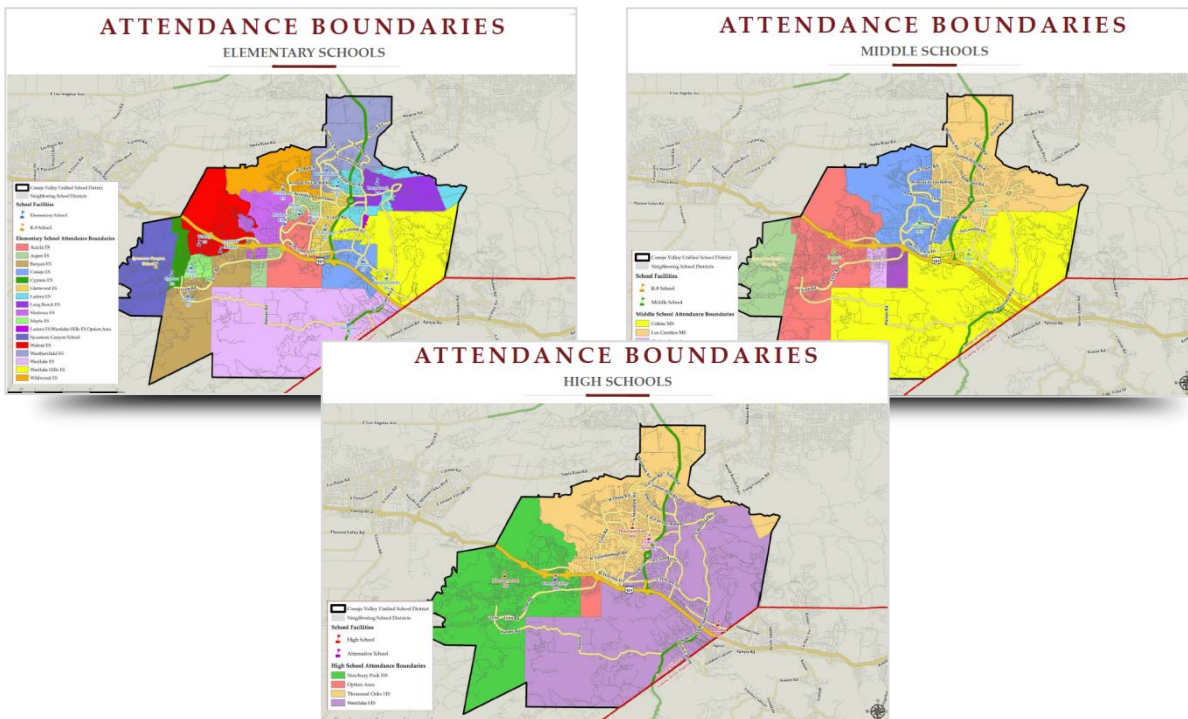
Perrydale School District, OR
Enrollment Projections

Rochester Public Schools, MN
Demographics; Facilities Master Plan

PAST PROJECTS

Sample Redistricting Clients:

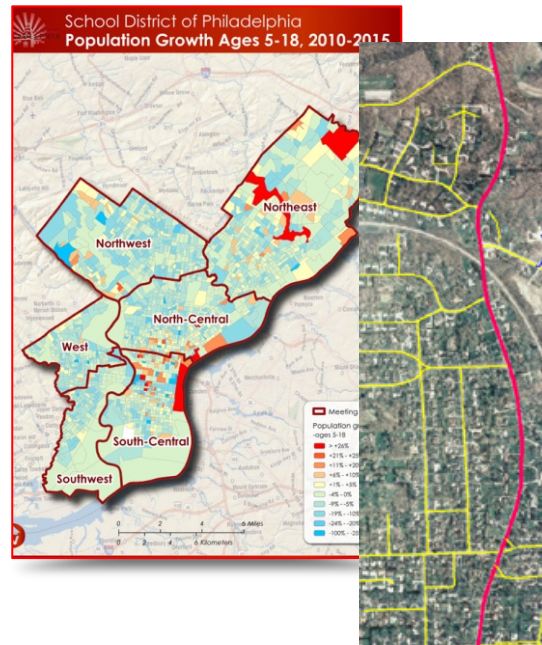
- Adelanto School District, CA
- Baltimore City Public Schools, MD
- Bridgeport Public Schools, CT
- Cleveland Heights – University Heights City School District, OH
- Cypress School District, CA
- Duval County Public Schools, FL
- Fort Bend Independent School District, TX
- Huntsville City Schools, AL
- Kokomo-Center School Corporation, IN
- Lake Elsinore Unified School District, CA
- Lapeer Community Schools, MI
- Marysville City Schools, OH
- Middletown City School District, OH
- Midland Independent School District, TX
- Montgomery County Public Schools, VA
- Moreland School District, CA
- Olentangy Local Schools, OH
- Palm Springs Unified School District, CA
- Pasadena Unified School District, CA
- Polk County Schools, FL
- Princeton City School District, OH
- Redondo Beach Unified School District, CA
- Rialto Unified School District, CA
- Roseville City School District, CA
- Shenandoah County Public Schools, VA
- South-Western City Schools, OH
- Teays Valley Local School District, OH
- Williamsburg-James City County Public Schools, VA



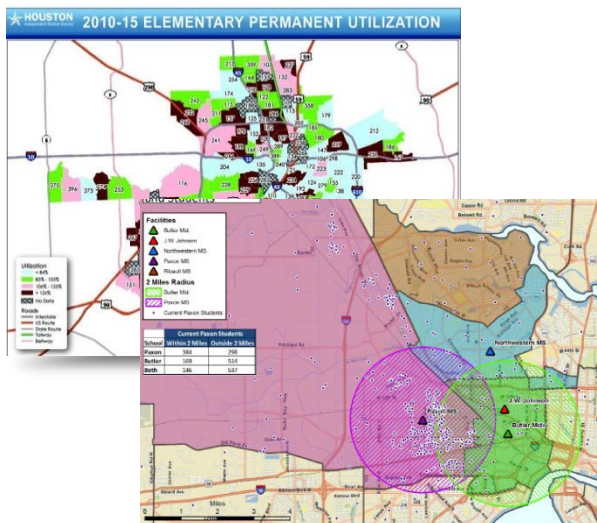
SECTION IV – Past Projects

Sample GIS Clients:

- Alexandria City Public Schools, VA
- Anchorage School District, AK
- Austin Independent School District, TX
- Baltimore City Public School System, MD
- Beaufort County School District, SC
- Beverly Hills Unified School District, CA
- Bridgeport Public Schools, CT
- Broward County Public Schools, FL
- Catholic Diocese of Arlington, VA
- Clark County School District, NV
- Cleveland Heights-University Heights City SD, OH
- Cleveland Municipal School District, OH
- Columbus Public Schools, OH
- Dayton Public Schools, OH
- Duval County Public Schools, FL
- Fargo Public Schools, ND
- Fort Wayne Community Schools, IN
- Fort Worth Independent School District, TX
- Goose Creek Consolidated Independent School District, TX
- Huntsville City Schools, AL
- Houston Independent School District, TX
- Iowa City Community School District, IA
- Independent School District of Boise City, ID
- Jefferson County Public Schools, CO



- Lapeer Intermediate School District, MI
- Mason City Schools, OH
- Memphis City & Shelby County Schools, TN
- Midland Independent School District, TX
- Montgomery County Public Schools, VA
- Montgomery Public School System, AL
- MSD of Lawrence Township, IN
- Olentangy Local Schools, OH
- Orange County Public Schools, FL
- Peters Township School District, PA
- Pittsburgh Public Schools, PA
- Savannah-Chatham County Public Schools, GA
- School City of Hammond, IN
- School District of Philadelphia, PA
- Scottsdale Unified School District, AZ
- Seattle Public Schools, WA
- South-Western City Schools, OH
- State College Area School District, PA
- Toledo Public Schools, OH
- Virginia Beach City Public Schools, VA
- Washington Township Metropolitan School District, IN
- Williamsburg-James City County Schools, VA
- Worthington City Schools, OH
- Zeeland Public Schools, MI



REFERENCES

School District	Contact Information	Address
Columbia Public Schools	Dr. Peter Stiepleman Superintendent 573.214.3410 pstiepleman@cpsk12.org	1818 West Worley Street Columbia, MO 65203
Rochester Public Schools	Michael Munoz Superintendent 507.328.3000 rhalley@tvsd.us	615 7th Street SW Rochester, MN 55902
Hamilton Southeastern Schools	Dr. Allen Bourff Superintendent 317.594.4100 abourff@hse.k12.in.us	13485 Cumberland Road Fishers, IN 46038
Olentangy Local Schools	Mark Raiff Superintendent 740.657.4050 mark_raiff@olsd.us	814 Shanahan, Suite 100 Lewis Center, OH 43035

FEE PROPOSAL

The proposed fee for Cooperative Strategies to perform the services as described in the Scope of Work in Section II of this Proposal is outlined in the table below.

Service Description	Proposed Fee
K-12 Boundary Planning	\$58,900 (Plus, Estimated Expenses at \$14,855)