

Purchase Order # 211853-2



Mt. Diablo Unified School District
1936 Carlotta Drive
Concord, CA 94519

Amendment No. 1 to

- Independent Service Contract**
- Master Contract**

This Amendment is entered into between the Mt. Diablo Unified School District (MDUSD) and State Facility Consultants (CONTRACTOR). MDUSD entered into an Agreement with CONTRACTOR for professional services on October 13th, 2021 and the parties agree to amend that Agreement as follows.

1. Services: (Check and complete ONE of the options below).

- CONTRACTOR agrees to provide the following amended services. (Provide full description of expected final results, such as services, materials, products, and/or reports; attach additional pages as necessary).

Assist the Client with its New Construction and Modernization applications for funding under the State School Facility Program

- The scope of work is attached as Exhibit A (incorporated by reference to the extent that it is subordinate to and not inconsistent with this Agreement).

The scope of work is unchanged.

2. Terms: (Check and complete ONE of the options below).

The contract term is extended by an additional _____ (days/weeks/months), and the amended expiration date is _____, 20____.

The contract term is unchanged.

3. Compensation: (Check and complete ONE of the options below. This provision may only be changed if there is also a change to the above Services OR Terms of the Contract).

The rate is amended by an increase of decrease of \$ _____ for _____ type of service

The contract amount is amended by an increase of decrease of \$ NTE \$48,000.00 Per Year to original contract amount.

The amended contract amount rate is now \$ 106,500.00

4. Remaining Provisions: All other provisions of the Agreement, and prior Amendment(s) if any, shall remain unchanged and in full force and effect as originally stated.

5. Amendment History: This contract has previously been amended as follows:

No.	Date	General Description of Reason for Amendment	Amount of Increase/Decrease
			\$
			\$
			\$

6. Approval: This Agreement is not effective and no payment shall be made to Contractor until it is approved. Approval requires signature by the Superintendent (or his designee).

Mt. Diablo USD

By: [Signature]
Budget Administrator/Principal

Mt. Diablo USD

By: _____
Superintendent or Designee

Contractor

By: [Signature]

Board Approval (if needed)

Docket Number: _____
Agenda Item Number

Date: 10/5/2021

Date: _____

Date: 10/04/21

Date: _____

Exhibit A

SCHOOL
FACILITY
CONSULTANTS



Professional Consulting Services Proposal

Prepared for:

Mt. Diablo Unified School District

Attention:

Lisa Gonzales, Ed.D.

Chief Business Officer

Email: gonzaleslm@mdusd.org

Phone: (925) 682-8000

Primary Contact:

Matthew A. Pettler

Vice President

Email: matt@s-f-c.org

Phone: (916) 441-5063

Exhibit A



Letter of Transmittal

July 6, 2021

Dr. Lisa Gonzales, Ed.D.
Chief Business Officer,
Mt. Diablo Unified School District
1936 Carlotta Drive
Concord, CA 94519

Subject: Proposal for Consulting Services

Dear Dr. Gonzales:

School Facility Consultants (SFC) is pleased to present Mt. Diablo Unified School District (Client) this Proposal for Consulting Services. We believe School Facility Consultants can assist the Client with maximizing its State School Facility Program funding.

SFC is a full service company which has been assisting its clients in all aspects of school facility planning since 1986. SFC offers a wide variety of services, including the preparation of State funding applications, California Department of Education school site and plan approval. The team is also active in the implementation, analysis and monitoring of State programs and regulations, and has developed strong working relationships with state agency staff members. With decades of combined experience and diverse backgrounds, our team members work collaboratively, providing a comprehensive knowledge base to address the unique needs of our clients.

Specifically, SFC proposes the following services:

- Assist the Client with its New Construction and Modernization applications for funding under the State School Facility Program

We very much appreciate your consideration of our firm and are happy to discuss in detail any of the proposed services. Please do not hesitate to contact us at your earliest convenience with any questions.

Sincerely,

A handwritten signature in blue ink, appearing to read "Matthew A. Pettler", with a horizontal line extending to the right.

Matthew A. Pettler
Vice President

Exhibit A



Experience and Qualifications

FIRM INFORMATION

School Facility Consultants (SFC) has assisted its clients in all aspects of school facility funding and planning since 1986. We have worked with clients to realize over five billion dollars in school facility funding including new construction, modernization, and renovation projects. Our knowledgeable staff understands the intricacies of the planning and funding process in California, including the procedures and requirements of the California Department of Education (CDE), Office of Public School Construction (OPSC), Division of the State Architect (DSA) California Energy Commission (CEC) and Department of Toxic Substances Control (DTSC).

With decades of combined experience in a wide range of school facility issues, we at School Facility Consultants are committed to integrity, professionalism and excellence in all that we do. We are comprised of a diverse group of motivated individuals guided by the shared endeavor of applying analysis and strategy to achieve concrete results for our clients.

At SFC, we offer a full-range of comprehensive services and work closely with clients to become a seamless extension of facility teams. Based in Sacramento, our consulting teams are active in the implementation, analysis, and monitoring of State programs and regulations. We have developed strong working relationships with state agency staff members and bring a deep understanding of facility planning to each of our client's projects.

SFC's team structure provides its clients with reliability, accessibility and a broad knowledge base. The SFC partners maintain direct involvement with clients through regular communications with the consulting teams providing strong connections between consultants and clients. A Senior Consultant serves as the primary client liaison and manager of each client's project issues. Additional consulting staff is available on the team to provide additional support, research, and production of work product. Team Leaders manage workload and troubleshoot potential issues for the team. The team approach ensures that a consultant is always available to provide immediate assistance to clients. By working collaboratively, our consulting team members contribute their individual expertise toward an extensive and comprehensive knowledge base that addresses the unique needs of individual clients.

SFC was built upon its strong values, culture, and work ethic. These qualities make for a highly effective and successful work environment for its staff, promoting teamwork and providing valuable opportunities for individual employee growth potential. This positive environment encourages productivity, and allows for the highest level of service for our clients.

Exhibit A



Experience and Qualifications

STATE FUNDING ELIGIBILITY AND APPLICATION

California school districts and county offices of education have the potential to realize significant State funding contributions through individualized analysis of funding eligibility under the State's School Facility Program (SFP). SFC consulting staff is trained to analyze complex data sets in order to determine eligibility and access funding available through the Office of Public School Construction (OPSC) and other State agencies. SFC assists districts in navigating the multi-step requirements and coordinating with these agencies through the entire funding process.

FUNDING STRATEGY

By synthesizing our various areas of technical expertise, SFC consulting staff is equipped to develop complex and effective long and short term funding strategies that provide proven results in facilities funding. As a full-service consulting firm, SFC has the ability to take school districts facilities projects from start to finish, applying methodology that garners the greatest funding gains while addressing specific and individual project needs which may evolve during the life of the project. SFC assists clients in providing a long term strategy which results in maximizing outside funding sources to expand the life of their local funding availability. These efforts ultimately afford our clients with the ability to provide additional and enhanced learning environments for students.

PROJECT CLOSEOUT AND AUDIT SUPPORT

As part of participation in the SFP, school districts and county offices of education are required by statute and regulation to conform to a number of certifications, as well as to ensure that funds received are expended appropriately. As part of the project closeout process SFC assists clients in compiling the documentation necessary to demonstrate conformance with expenditure requirements and the numerous certifications in order for clients to retain their awarded project funding amounts.

MASTER PLANNING

Clients utilize Master Plans to forecast their facility needs into the future. SFC produces comprehensive Master Plans for clients, which assess potential impacts associated with outside area developments such as new residential development, shifts in demographic trends, and fluctuating district boundaries. Unification studies, territory transfer and school site placement are interpreted as the physical needs of clients' facilities are also assessed and addressed through the use of Master Plans.

DEVELOPER FEE STUDIES

School districts are authorized to collect impact fees on new residential and commercial/industrial development pursuant to California law. The preparation of developer fee studies in accordance with statute is required in order for districts to collect these fees. These studies utilize local district data, including new residential development, historical statistical information, and school construction costs to determine the dollar amount that can be justified for collection by the school district. SFC's Planning Division prepares Justification Studies (Level 1) and School Facility Needs Analysis Studies (Level 2 and 3) according to the State Allocation Board's (SAB) provisions.

DEVELOPMENT MITIGATION SERVICES

SFC assists clients with development mitigation services. Services include Student Generation Rate Studies, Mitigation Impact Reports and Fair Share Studies. SFC consulting staff is available to provide comments on the potential impact of planned developments including general plans, specific plans and environmental impact reports. SFC consultants provide Geographic Information System (GIS) mapping services to inform student generation rates on a district-wide basis, by attendance area and for specific development projects. Should a district experience a fee challenge, staff are available to provide expert witness testimony and/or a professional review of developer fee justification reports or mitigation agreements.

Exhibit A

Experience and Qualifications



Alexander R. Murdoch

School Facility Consultants, President/Partner

PROFESSIONAL QUALIFICATIONS

Alex Murdoch has worked in the school facility industry for over twenty five years providing consulting services for clients in all areas of school facility planning and funding. As President and Partner of School Facility Consultants, Alex applies sophisticated methodologies to the facility funding and planning process resulting in the successful, timely delivery of innovative and complex projects.

As an industry leader, Alex is credited with a number of significant accomplishments including innovative planning that resulted in funding for a school district's reuse of commercial property for educational and economic revitalization purposes, being first to secure a lease/lease-back funding guarantee from the Office of Public School Construction for a school district and being first to receive special, legislated funding for a school district's multi-story replacement project.

Alex applies a nuanced approach to the political intricacies of the allocation of school facilities funding. He works to increase the Federal commitment to California school facilities. Alex specializes in identifying statewide policy trends, which are beneficial to the firm's clients. As an appointed member of statewide committees, Office of Public School Construction's Ad Hoc Committee in 2007 and the Coalition for Adequate School Housing's Grant Adequacy Committee in 1999, Alex has been instrumental in contributing to changes in regulations and legislation that benefit schools in California today.

Alex has crafted dozens of successful appeals to the State Allocation Board, brought numerous special items before the State Allocation Board and has crafted successful statewide bond provisions. His expert understanding of California Ed code and School Facility Program regulations has resulted in millions of dollars of funding for California school districts.

Education:

Bachelor of Arts - Political Science and Economics, University of California, Davis

Years with Firm:

27

Professional Affiliations:

C.A.S.H. – Coalition for Adequate School Housing
C.A.S.B.O – California Association of School Business Officials
School Energy Coalition
Californians for School Facilities
Small School Districts Association
County School Facilities Consortium

Exhibit A



Experience and Qualifications



Matthew A. Pettler

School Facility Consultants, Vice President/Partner

PROFESSIONAL QUALIFICATIONS

Matt Pettler has been with School Facility Consultants (SFC) for over 20 years and became a Principal and Partner in the Firm in January of 2007. Matt currently serves as Vice President and has assisted hundreds of clients receive billions of dollars in capital outlay funds for public school facilities in California. Matt specializes in managing client projects in all areas of the State School Facility Program as well as leading developer fee mitigation and District Facility Master Planning efforts.

During his time with SFC, Matt has played a key role in multiple successful school district appeals before the State Allocation Board gaining over \$600 million dollars in Financial Hardship, Overcrowding Relief Grant and Facility Hardship funding. Matt has also assisted many school districts with complex audit/closeout issues reaching successful outcomes, avoiding Material Inaccuracy penalties.

Additionally, Matt has prepared developer fee justification documents and successfully worked with the Building Industry Association (BIA) to secure millions of dollars needed to offset the impact of new residential development. He has led master planning teams in a number of school districts, allowing those districts to plan and execute successful bond elections and construct needed facilities for students.

Through these successes Matt has established relationships with State Allocation Board members, their staff and State Agency leadership.

Education:

Bachelor of Arts - Political Science and Public Policy, University of California, Los Angeles

Years with Firm:

23

Professional Affiliations:

C.A.S.H. – Coalition for Adequate School Housing
C.A.S.B.O – California Association of School Business Officials
School Energy Coalition
Californians for School Facilities
Small School Districts Association
County School Facilities Consortium

Awards:

Matt is a 2011 Coalition of Adequate School Housing Service Award Recipient

Exhibit A



Proposed Services

School Facility Consultants (SFC) proposes providing the following services:

- Assist with the preparation and submittal of California Department of Education (CDE) plan approval requests
- Prepare, submit and monitor State Allocation Board applications for Modernization projects as determined by the funding opportunities identified:
 - SAB 50-04, *Application for Funding* and justification documents
 - Office of Public School Construction 24 Hour, 15 Day & 4 Day letter assistance
 - SAB 50-05, *Fund Release Authorization* and justification documents
- Assist Client with planning services, as requested by the Client, and as accepted by the Contractor.

Exhibit A



Proposed Fees

SFC proposes to bill for services on a time and materials basis at the rate schedule below not to exceed \$48,000 per year without prior Client approval.

If it becomes necessary for a Consultant from SFC to visit the Client, the Client will pay for travel time at the rate schedule below. The Client will also reimburse SFC for all necessary and pre-approved travel expenses.

Hourly Rate Schedule

Principal	\$250 per hour
Director	\$205 per hour
Senior Consultant	\$200 per hour
Consultant	\$180 per hour
Research Analyst	\$150 per hour
Administrative Support	\$ 90 per hour