

EXHIBIT A

STATEMENT OF WORK

MT. DIABLO UNIFIED SCHOOL DISTRICT DEVELOPER FEE JUSTIFICATION STUDY SERVICES

Cooperative Strategies, LLC shall prepare: Residential and Commercial/Industrial Development School Fee Justification Studies ("Studies") for Mt. Diablo Unified School District ("Client" or "School District"). The Studies will justify statutory school fees ("School Fees") for the School District and will also identify the full school facilities impacts to be mitigated by these types of development within the School District. The specific activities and tasks to be performed under this Statement of Work include the following:

Residential Development School Fee Justification Studies

ACTIVITY I. BACKGROUND RESEARCH

Task 1 Student Generation Factors

This task involves calculating student generation factors ("SGF") by housing category (i.e., single family detached and multi-family attached) and school level. SGFs will be calculated by comparing student enrollment of the School District to residential data provided from the County Office of the Assessor ("Assessor").

Task 2 Existing School Facilities Capacity

This task involves reviewing the school facilities capacity of the School District as reported on SAB Form 50-02 to determine the number of students that can be adequately housed at each school level. In the absence of SAB Form 50-02, Cooperative Strategies will work with the School District to calculate the school facilities capacity based on an inventory of classrooms being utilized by the School District and their corresponding student loading standards at each school level.

Task 3 Future Residential Units

This task involves reviewing general plans and specific plans of jurisdictions (e.g., city or county) served by the School District, as well as tentative and final tract maps in the School District and other data to estimate the number of future residential units by housing category that can be constructed within the School District.

ACTIVITY II. DETERMINE SCHOOL FACILITY NEEDS

Task 4 Existing Capacity vs. Student Enrollment

This task involves comparing existing enrollment to facilities capacity as determined in Task 2 to determine whether any surplus seats exist to house students generated from future residential units. Cooperative Strategies will compare the enrollment to the capacity by school level.

Task 5 Student Enrollment Projections

This task involves projecting the number of students to be generated by housing category and school level from future residential units within the School District. Enrollment projections will be based on SGFs calculated in Task 1 and future units identified in Task 3.

Task 6 School Facility Needs

This task involves determining the number and type of school facilities by school level that will need to be expanded by the School District based on the projected enrollment calculated in Task 5 and the capacity of existing school facilities analyzed in Task 4. Cooperative Strategies will determine the amount of facility expansion needed to adequately house all of the students at build-out.

ACTIVITY III. SCHOOL FACILITIES IMPACT PER HOUSING CATEGORY

Task 7 School Facility Costs

This task involves reviewing and analyzing documents of the School District to estimate the cost of constructing or expanding the school facilities identified in Task 6. If the School District cannot provide Cooperative Strategies with sufficient/adequate cost information regarding the construction or expansion of school facilities, Cooperative Strategies will estimate school facility expansion costs based on square footage and cost allowances established by the Office of Public School Construction.

Task 8 School Facilities Impact Analysis for Residential Development

This task involves estimating the full school facilities impacts per unit and square foot of residential floor space that must be mitigated by each housing category. Residential housing impacts will be based on data and material assembled in Activities I, II, and III. If full school facilities impacts per square foot of residential floor space exceeds the new School Fee for a housing category, then the full new School Fee is justified for such housing category.

ACTIVITY IV. STUDY PREPARATION

Task 9 Study Preparation

This task involves preparing one (1) draft and one (1) final version of the report presenting the findings of the Residential Study. Cooperative Strategies shall provide the final version of the report in PDF format, in addition to bound copies in the quantity requested by the School District.

Commercial/Industrial Development School Fee Justification Studies

ACTIVITY V. SCHOOL FACILITIES IMPACT PER COMMERCIAL/INDUSTRIAL BUILDING

Task 10 Employer Research

This task involves determining the employment generation rates per building square foot and per gross acre by commercial/industrial building and the employee migration factor for the School District. Cooperative Strategies will determine employment generation rates and employee migration factors by reviewing prior Studies prepared for the School District or analyzing data provided by the San Diego Association of Governments ("SANDAG") and the Bureau of the Census.

Task 11 Commercial/Industrial Fee Analysis

This task involves estimating the amount of developer impacts per square foot of floor space for each commercial/industrial building identified in Task 1, based on prototypical land use units of 1,000 square feet of floor space each. This task includes the following subtasks:

11.1 Employment Impacts

This subtask involves estimating the on-site employment impact of a prototypical land use unit. Employment impacts will be determined by land use and industry type, based on employment generation factors identified in Task 1.

11.2 Household Impacts

This subtask involves estimating, for each commercial/industrial building, the number of new households that will (i) locate within the School District, and (ii) generate additional demand for school facilities, based on the Employment Impacts per commercial/industrial building unit from Subtask 11.1. This subtask consists of six (6) additional duties, all but one of which will be applied separately to each commercial/industrial building identified in Subtask 11.1.

- A. Estimate the current number of workers per household within the School District (if possible, by commercial/industrial building) based on current housing and employment estimates by state and county agencies, supplemented by the Census and other available data.
- B. For each commercial/industrial building, project the number of new "total households" established by persons employed within the School District, wherever these households may reside, based on Subtasks 11.1 and 11.2.A. This is the total household impact.
- C. For each commercial/industrial building, estimate the propensity to migrate, i.e., the percentage of new total households identified in Subtask 11.2.B that will reside within the School District, based on employee residence information from the Census and other sources.
- D. For each commercial/industrial building, project the number of new "local households" that will locate within the School District as a direct result of commercial/industrial development within the School District, based on Subtasks 11.2.B and 11.2.C. This is the local household impact.
- E. Estimate the propensity to occupy new housing, i.e., the percentage of new local households identified in Subtask 11.2.D that will reside in new housing units or displace existing households that will move into new housing units. The total percentage of new local households falling into these categories will be derived from the current ratios of new to existing home sales in the general School District area, as indicated by the State Department of Finance, Dataquick, and other sources.
- F. For each commercial/industrial building, project the number of new "net local households" that will locate within the School District as a result of commercial/industrial development within the School District, based on Subtasks 11.2.D and 11.2.E. This is the net local household impact.

11.3 Student Generation Impacts by School Level

This subtask involves estimating student generation impacts by School Level for each commercial/industrial building. This subtask consists of two (2) additional duties:

- A. Estimate student enrollment increases for each commercial/industrial building, based on SGFs calculated in Task 1 of the Residential Study and the net local household impacts per commercial/industrial building unit from Subtask 11.2.F.

- B. Estimate additional student enrollment increases for each commercial/industrial building based on (i) employment-related interdistrict transfer rates and (ii) estimated student enrollment increases per commercial/industrial building from Subtask 11.3.A.

The sum of both student enrollment increases from Subtasks 11.3.A and 2.3.B is the student generation impact.

Task 12 **School Facilities Impact Analysis for Commercial/Industrial Development**

This task involves estimating the full school facilities impacts per 1,000 square feet of commercial/industrial floor space that must be mitigated by each commercial/industrial building. If the full school facilities impacts per square foot of commercial/industrial floor space for commercial/industrial building are less than the difference between the average Residential Impact per building square foot and the new Statutory School Fee, then the full impacts for that commercial/industrial building may be charged to the developer.

ACTIVITY VI. STUDY PREPARATION

Task 13 **Study Preparation**

This task involves preparing one (1) draft and one (1) final version of the report presenting the findings of the Commercial/Industrial Study. Cooperative Strategies shall provide the final version of the report in PDF format, in addition to bound copies in the quantity requested by the School District.

Studies Adoption Assistance

ACTIVITY VII. ASSISTANCE IN ADOPTION OF STUDIES

Task 14 **Respond to Public Comments**

This task involves reviewing any written comments received from members of the development community related to the Studies and assisting staff of the School District and legal counsel provide written responses to such comments.

Task 15 **Preparation and Attendance at Meetings**

This task involves working with staff of the School District and legal counsel to prepare for any meetings with members of the development community prior to or after the adoption of the Studies. Cooperative Strategies, at the request of the School District, will participate in such meetings to provide data or explanation for the Fee Studies.

Task 16 **Attendance at Meetings of the Governing Board**

This task involves attending one (1) meeting where the public hearing and/or consideration of the Studies occurs. Cooperative Strategies shall be prepared to present the Studies or answer any questions from members of the Governing Board or public related to the Studies.

EXHIBIT B

FEE SCHEDULE

**MT. DIABLO UNIFIED SCHOOL DISTRICT
DEVELOPER FEE JUSTIFICATION STUDY SERVICES**

The proposed budget for services performed by Cooperative Strategies, LLC for Mt. Diablo Unified School District ("Client" or "School District") under the Statement of Work shall be a flat fee (plus expenses as outlined in Section 3.2) based on the option selected below by the School District. The first installment, representing 50 percent of the amount selected below, shall be payable to Cooperative Strategies upon commencement of work. The second installment, representing the remaining 50 percent shall be payable upon delivery of the completed Studies.

_____ **Option 1:** Cooperative Strategies shall complete Studies in fiscal year 2019/2020
Initials **Fee:** \$8,510 (plus expenses not to exceed \$851)

_____ **Option 2:** Cooperative Strategies shall complete Studies in 2019/2020, 2021/2022 and
Initials 2023/2024
Fee: \$7,770 per year (plus expenses not to exceed \$777)

Payments are due upon presentation of invoice. Cooperative Strategies may stop work if payments are not made within 45 days of presentation of invoice.

Limitations

It is assumed that the School District or its consultants will provide all required enrollment, school facility, and other data and materials identified in the Statement of Work. If Cooperative Strategies must assume primary responsibility for any responsibilities of the School District, such tasks may be defined as Additional Work if they cause the maximum budget amount to be exceeded. Additional Work may also include other tasks not described in the Statement of Work.